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THE UNIVERSITY OF ALBERTA

A STUDY OF THE OPERATION OF SCHOOL BOARDS IN THE
LARGE RURAL SCHOOL UNITS IN ALBERTA

by

Irving Hastings

A Thesis

Submitted to the Faculty of Graduate Studies
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University of Alberta
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The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies for acceptance, a thesis entitled "A Study of the Operation of School Boards in the Large Rural School Units in Alberta" submitted by Irving Hastings in partial fulfillment of the requirements for the degree of Master of Education.

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ABSTRACT

This investigation of the operation of Alberta school boards and county school committees was patterned after a study conducted by Dr. Harlan Bruce Brubaker, University of Indiana, 1952. This study, like Dr. Brubaker's, investigated the operation of school boards. However, unlike the Brubaker study, it did not attempt to analyze the socio-economic status of school board members.

A study of the literature under four main areas of school board operation was made. These areas were:

(1) policies, rules and regulations; (2) relation to administration and staff; (3) relation to the community; (4) business procedures. From these four broad areas, fourteen guidelines were developed which in turn yielded forty specific criteria that were used as a basis for studying the operation of Alberta school boards. Each criterion was formulated into a question and the resulting questionnaire was sent to all provincially appointed superintendents in Alberta school divisions and counties.

Data from the questionnaire were tabulated for each criterion that had been established from a study of the literature. The data were given interpretation in terms of the criteria established.

The findings were reported under four main areas of school board operation. Some of the major findings are:

(1) Policies, and rules and regulations. School boards in Alberta do not generally operate as policy-making bodies that delegate the execution of policies to their administrative staffs.

(2) Relation to administration and staff. Superintendents reported that school boards appoint professional staff recommended by the superintendent, but do not follow this procedure with respect to non-professional employees. Few boards have lists of duties for all of their employees. Almost all boards seek the professional advice of the superintendent but consult teachers and laymen infrequently.

(3) Relation to the community. School boards in Alberta do not have well-organized public relations programs. Board contacts with the public tend to be on an informal, unorganized basis. Outsiders generally do not attend board meetings. School facilities are made available to community groups by almost all boards.

(4) Working procedures and related matters. In many instances, business procedures used by school boards are weak. Typically school boards use permanent standing committees and hold meetings in a regular place. Business and financial matters take a large portion of the time at each meeting. Few boards have an agenda for the year.

Suggestions based on the findings of the study are presented in the last chapter.

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CHAPTER I

INTRODUCTION TO THE PROBLEM

School boards occupy a significant position in the Alberta school system. They are established by the legislature and granted sufficient legal powers to enable them to influence to a considerable degree the educational program in each division and county. No public institution is more important than the school board. The schools of today will largely determine what the citizens of the next generation will be. School boards largely determine what the schools are.

School board functions, complex and challenging, have become doubly difficult with the steady growth in pupil enrollment, the lack of qualified professional staff, public demand for additional school services, the creation of larger units of administration, and the new patterns of school finance. As a nation we must be prepared to educate more people and to educate them longer and better than in the past. This job lies, to a large extent, in the hands of school boards.

Since school board members are in a position to influence to a large extent the nature and direction of the educational process, there is general agreement that ineffective school board operation represents an important problem to education. If school boards are to

cope with these new demands, it will be essential that they confine their time and energies to those activities which make their operation most effective.

The central role played by school boards in education is receiving considerable attention. As a result, various institutions in the United States are exploring ways to improve school board operation. Stapley refers to examples where universities and colleges, state departments of education, teachers' associations and administrative organizations are playing a significant part in assisting school boards to become more effective.¹

I. THE PROBLEM

Statement of the Problem. This study was concerned primarily with the operation of school boards in Alberta. A secondary purpose was to review briefly the legal setting of school boards.

The major purpose of this investigation centered around four main areas of school board operation:

1. Policies, rules and regulations
2. Relation to administration and staff
3. Relation to community
4. Working procedures and related matters

More specifically, the study attempted the following:

1. To determine how the authorities in educational administration think school boards should operate in each of the four areas mentioned previously.
2. To determine how Alberta School Boards do operate in each of the four areas mentioned previously.
3. To make suggestions for the improvement of the operation of school boards in Alberta.

Importance of the Study. Within the past few years increased attention has been given to the importance of the work of school boards. Interest in improving their effectiveness is widespread. As a result, school boards in both the United States and Canada have been the subject of several studies. Although several studies have been conducted, few however - with the notable exception of the Midwest Administration Center² studies and those by Roebathan³ and Timons⁴. - have focused on the actual operation of school boards. It was felt that a study that would give up-to-date information concerning school board operation in Alberta might provide an impetus to improve school board functioning. Since the quality of our schools may be extensively determined by the efficiency or inefficiency of school boards, it seems necessary that both boards and superintendents understand clearly the factors

which make for more effective school board operation.

Limitations of the Study. The limitations of the study may be discussed under the headings: restrictions placed on the study, weaknesses which may be inherent to the study itself.

One restriction of the study was that it was primarily descriptive rather than normative in nature. Also, it was confined to an investigation of the operation of divisional boards and county school committees only. Hence, the study did not include district boards in either rural or urban centers or private school boards. This investigation was restricted to the study of thirty divisional boards and twenty-eight county school committees or approximately forty-five per cent of the operating public school boards in the province. Northland School Division was not included as its board was appointed rather than being elected as is the usual procedure in Alberta.

The major weakness of the study centered around the collection of accurate information. It was hoped that this weakness would be somewhat lessened by the construction of a questionnaire which called for objective responses. While it was realized that school board members, or school board secretaries might have been asked to complete the questionnaire, it was felt that superintendents by virtue of their training and experience would be able to supply

more accurate information. Also, it was anticipated that superintendents would return a higher percentage of questionnaires than any other group.

Another weakness of the study stemmed from the fact that some of the literature used to substantiate the guidelines was drawn from United States sources. However, this was used only when it seemed authoritative and in agreement with Canadian literature.

Basic Assumptions. This study is based on the following assumptions:

1. That it is possible to get a true and accurate picture of the operation of school boards by means of a questionnaire.
2. That the operation of school boards has an important influence on the schools, and hence, is worthy of study.
3. That school boards of divisions and county school committees operate very similarly.

II. DEFINITION OF TERMS

The terms defined in this section are those whose meaning and use may not be clear.

Policies are guidelines or principles adopted by the board to assist the administration to establish the limits of its action. They are guides for discretionary

action.

Regulations or Rules are the detailed directions necessary to put policies into effect. These are usually developed by the administration.

School Board or Board means the board of trustees of a school division or the school committee of a county.

Superintendent refers to a school superintendent appointed by the Minister of Education to a school division or county in Alberta.

By-Laws are a board's formally adopted internal rules, standards of operation, or working procedures.

Guidelines are outlines of policy, principles of conduct, to guide a board.

Operation is the doing or performing of the practical work of the board.

III. PROCEDURES USED AND SOURCES OF DATA

Legal Background. As stated previously, this study was concerned primarily with the operation of Alberta school boards in divisions and counties. However, no study of the operation of Alberta school boards would be complete without some understanding of their legal status. Studies by Lamb,⁵ Bergen,⁶ and Enns⁷ along with the Alberta School Act⁸ provided much pertinent information.

Sources of Data. Two main sources of data were used:

1. Literature from both Canada and United States sources was reviewed in order to establish guidelines for studying school board operation. Research studies, periodicals, books, and reports of conferences and surveys were used. From the guidelines, specific criteria were derived for determining the extent to which Alberta school boards operate in accordance with the practices recommended by authorities in educational administration.

2. The primary data on which this study was based were collected from the fifty-eight counties and school divisions in Alberta. Northland School Division was not included for the reason mentioned previously.

Related Studies. Although several status studies of school boards have been conducted, few studies have attempted to investigate the operation of school boards.

Roebathan⁹ studied the operation of Anglican boards in Newfoundland. From information gained from the Newfoundland Department of Education Statutes, along with a survey of the literature, he developed ten specific criteria for assessing the operation of school boards in that province.

Two United States studies concerned with assessing the operational procedures of school boards were those of Timmons¹⁰ and Brubaker.¹¹ Timmons submitted one hundred

and fifty practices "commonly employed by school boards" to one hundred professors of educational administration and had the professors rank the practices from most important to least important on an eleven-interval scale. The thirty-two items having the smallest dispersion were chosen to be included in the scale and values were assigned to each by determining the median location for the one hundred judges. By checking the items that were on the scale which were followed by the board, the user of the scale was provided with a means of assessing the operation of the board being evaluated.

Brubaker¹² did a comprehensive study of the operation of school boards in the state of Indiana. Because of the similarity between this study and that of Brubaker's, permission was requested from Dr. Brubaker to use questions from his questionnaire. Permission was granted.

The Brubaker Study.¹³ As part of Midwestern Administration Centre studies in educational administration, Brubaker undertook to evaluate the operation of Indiana school boards and to analyze the socio-economic status of board members. To accomplish his evaluation, he first surveyed the literature to arrive at some general guidelines regarding four broad areas of school board operation, namely: (1) policies, and rules and regulations; (2) relation

to administration and staff; (3) relation to community; (4) business procedures. From these four broad areas of school board operation, he developed fifteen basic principles which in turn yielded thirty-two specific criteria that were used as a basis for his evaluation. Each criterion was formulated into a question and the resulting questionnaire was sent to one hundred and sixty superintendents of schools in Indiana state.

Data from the questionnaire were tabulated for each criterion with percentage distributions only being used.

Brubaker then made a subjective evaluation of the degree to which the results of his questionnaire met the criteria established from his study of the literature.

Construction of the Questionnaire. In the main, the same procedure that Brubaker used in his study was followed, although no attempt was made in this study to investigate the particular individual characteristics of board members. From the study of the literature, fourteen guidelines were established from which forty criteria were developed for determining the relative effectiveness of school boards. The questionnaire was constructed so that each criterion yielded one question. Since permission had been granted to use Brubaker's questionnaire, several questions that were suitable were

used. It was necessary to delete some questions that were not applicable to the Alberta scene, modify others to bring them into harmony with the criteria which the author had developed, and to add new questions to fit the new criteria.

To test the clarity and suitability of the preliminary draft of the questionnaire, a pilot study was carried out with four former superintendents. Each supplied answers to the questions and critically analyzed the instrument. A final revision of the questionnaire was based upon their suggestions and upon the suggestions made by Dr. Arthur Kratzmann, Executive Director, Alberta School Trustees' Association

Administration of Questionnaire and Collection and Treatment of Data. Verification of the need for this study as well as assurance of support were obtained from the Chief Superintendent of Schools for the province, who further signified his approval by providing a memorandum (Appendix B) that solicited the co-operation of superintendents included in the study.

The questionnaire (Appendix D) was sent to all provincially appointed superintendents of schools in Alberta. A covering letter (Appendix C) which explained the purpose of the survey, and instructions for completing the questionnaire along with a list of definitions of terms

used, accompanied each questionnaire. Each superintendent was asked to mark his questionnaire as coming from either a county or a division. Data reported by superintendents were tabulated, and the results compiled and investigated in terms of previously established criteria.

Percentage (rounded to the nearest integral value) distributions only were used to present the findings from the questionnaire. No statistical treatment for significance of differences on any level was used. The data were given partial interpretation in terms of the criteria established. As this study was to be exploratory and primarily descriptive in nature, it was expected that the observations might prove helpful to further more intensive study.

The information obtained from the superintendents is presented in Chapter IV. This information was organized under general headings which corresponded to the main headings used in the format of the questionnaire.

IV. THE ORGANIZATION OF THE REMAINDER OF THE THESIS

Chapter II attempts to establish the legal background and context of the study through a brief survey of the studies by Lamb, Barga, and Enns, and of the statutes of Alberta which impinge most directly upon school board operation. Chapter III is devoted to a review of the related literature on the operation of school boards with

the primary purpose of deriving guidelines, and from these guidelines developing specific criteria which would be valid in studying the operation of Alberta school boards. Chapter IV presents in terms of each criterion the information received in the questionnaires. Chapter V, a summary chapter, restates the major findings in terms of degree of conformity to each criterion, and presents the major conclusions of the study. Several suggestions are made for improving school board operation.

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Federation, 1959).

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Public School Pupil (Toronto: Macmillan Company of
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⁸Alberta. The School Act, R.S.A., 1964, c. 297,
pp. 55-72.

⁹Roebbothan, loc. cit.

¹⁰Timmons, loc. cit.

¹¹M. Bruce Brubaker, "An Evaluation of the Operation
of Indiana School Boards and an Investigation of Related
Areas" (unpublished Doctor's thesis, Indiana University,
1952).

¹²Ibid.

¹³Ibid.

CHAPTER II

THE LEGAL ASPECTS OF SCHOOL BOARD OPERATION

Several studies have been made and a number of books and articles have been written on the legal aspects of school board operation. Dissertations by Bargen and Enns are of particular significance to the Canadian scene.¹ These studies, along with The School Act,² were the main sources of information for this chapter. The legal aspects of school board operation are so vast as to defy complete treatment in a single chapter. The purpose of this chapter was to make a statement about some of the more important aspects of the legal status of school boards as background information to the study.

I. EDUCATION AS A STATE FUNCTION

The concept that public education is a provincial, rather than a federal function evolves directly from the B.N.A. Act, 1867. The constitutions of the individual provinces provide, with varying degrees of specificity, for the establishment and maintenance of a system of public schools. The power of the provinces over public education is plenary, except as restricted by the rights guaranteed to minority religious groups. Reeves, Cheal, and Melsness explain this provision when they state:

Section 93 of the British North America Act gives to each provincial government the sole right to make laws about education.

At the same time it guarantees that the rights of the minority religious groups in each province to have their own schools, will be respected.³

The authority over schools and school board operation is a central power residing in the legislatures of the provinces in Canada. It is for the law-making powers to determine whether the authority shall be exercised by the Provincial Department of Education, or distributed to the local organization.

In practice, to accomplish the ends expressed in provincial constitutions for public education, legislatures of the various provinces have established local school districts which in some cases have been reorganized into larger units of administration. The bases of establishing districts or altering their boundaries vary, but it is clear that the legislature has the authority to create and alter districts. A school board legally is an agent of the state, responsible for the state function of public school education within a geographical boundary. Thus the school board is completely subject to the control of the state.

II. GENERAL POWERS AND DUTIES OF SCHOOL BOARDS

The authority of a local board of education lies in the board as a quasi-corporate body. The board is the

administrative body for the school division or county, and its powers and duties are essentially those prescribed by the School Act. The board exists apart from the individuals composing it. Thus a change in board membership does not change the legal status of the board.⁴

Members of boards of education cannot as individuals exercise the corporate powers of the board. Actions to be legally binding must be taken by the board as a whole and at the same time be within the statutory and common laws. Boards may not divest themselves of the duties delegated to them by the provincial legislature. The duty of employing teachers in Alberta rests with the board; thus, the board must take action if a teacher is to be legally employed.⁵

Hamilton and Reutter state a basic principle of the courts in relation to school boards:

Of fundamental importance in understanding the relation of the courts to the local school board is the principle that the courts will not interfere with a decision of a board of education in an area in which the board has power to act unless it can be shown that the board abused its discretion.⁶

Legislatures create statutes designating special duties for school boards to perform. The amount of legislation varies from province to province. However, in no province do statutes provide for all school board responsibilities. When statutes do not provide legislation

or do not specify ways and means and extent of responsibility, school boards must exercise discretion.

Enns, in referring to the duties of school boards, states:

To carry out these duties they (boards) must follow the prescribed procedures as set out in the respective School Acts, and may exercise only these powers granted by law. However, permissive sections of the acts and sometimes vagueness in wording necessitate the exercise of board discretion. Thus, within limits of its authority, the board is a local government which not only legislates but also administers both its own regulations and the regulations of the department and legislature. Its own rules and regulations have the full force of the law and must be considered valid until challenged by the courts.⁷

In studies by Lamb and Borgen, liabilities sustained by pupils in accidents arising from the negligence of school boards, or their agents, have been stressed.⁸ The following statements summarize the legal position of school boards with regard to school accidents and the duties and responsibilities owed to pupils:

1. Boards in Canada have no general immunity in common law from tort action.
2. School boards cannot escape the responsibility for duties laid upon them by statute, regulations, or common law by delegating these duties to others.⁹

III. LEGAL POWERS AND DUTIES OF ALBERTA SCHOOL BOARDS

School control is centralized at both the local and provincial levels in Alberta. In rural areas, large units of administration, either counties or divisions, with either school committees or school boards are established under the provisions of the School or County Act and are to be considered quasi-corporations. For the purpose of transacting business, the School Act states that a majority of members is a quorum.

The school law of Alberta is embodied in five acts. The School Act deals with establishment, duties, and powers of local administrative units. The duties and powers of school boards are detailed separately in the Act.¹⁰

Mandatory Duties. For purposes of simplicity and brevity, some of the more important duties are summarized as follows:

1. To appoint a secretary and a treasurer, or a secretary-treasurer, and such other officers and servants as may be required;
2. To provide school accommodation for all children six years of age and over and to keep the same in good repair;
3. To erect, purchase, or rent suitable school

- premises and to maintain same, making proper provisions for drinking water, sanitation facilities, heating, lighting, and ventilation;
4. To carry insurance indemnifying itself and its employees;
 5. To prepare and adopt a detailed estimate of expenditures for the year and to requisition the required funds;
 6. To engage duly qualified teachers, and to designate, and transfer teachers as deemed desirable;
 7. To see that schools are conducted in accordance with the law and regulations and to submit to the Department of Education all reports required in connection with school operation;
 8. To determine the time or times in each year at which Grade One pupils will be admitted;
 9. To adopt a salary schedule for teachers and to arrange for payment according to the Act;
 10. To exercise a general supervision and control over the schools in the division under its jurisdiction;
 11. To pay fees for the attendance of pupils, including high school pupils at schools operated by other boards, whenever such service is not made available by the board itself.

Permissive Powers. Generally, powers of boards refer to those areas in the School Act or the General Regulations in which school law is permissive. Responsibility is not mandatory. The following are some of the powers granted school boards:

1. To pay the expenses of a trustee, or of an officer, or of an employee of the board incurred in attending a convention or educational conference or in carrying out the business of the board;
2. To provide a health service by employing physicians, dentists, and nurses;
3. To supply text books and other supplies;
4. To require the parent or guardian to replace or pay for school property destroyed or broken by the pupil;
5. To dismiss summarily or to suspend any teacher guilty of gross misconduct, neglect of duty, or refusal or neglect to obey a lawful order of the board;
6. To operate dormitories for pupils;
7. To decide the school which a pupil is to attend;
8. To provide scholarships;
9. To establish and organize special classes for

mentally handicapped, and to operate kindergartens and night classes.

The duties and powers of boards are much more extensive than those outlined above. The purpose here was to give an indication of some of the more significant powers and duties.

IV. SUMMARY

Although each Alberta School board is a quasi-corporation deriving its existence and authority from the province through the legislative assembly, each school board is, nevertheless, in a position to influence to a considerable extent the nature of the educational process in the area over which it has jurisdiction. Each school board is also able to influence indirectly the educational processes in other divisions through its local decisions, and through the Alberta School Trustees' Association.

School boards in Alberta enjoy a considerable amount of local autonomy. Practically all of the duties listed in the Act provide considerable latitude for discretionary action. For example, the board has to provide suitable classroom accommodation for the children of the division, but incorporated into this responsibility is a large measure of local control. The procedures to be employed, the facilities and services within reason, are left to the

local authorities. The board must decide with respect to the "interna" many aspects of its operation.¹¹

Roebathan concluded from his study of the Newfoundland scene that both the provincial and local levels of government have a measure of responsibility and control in education.¹² From a brief review of the literature and the School Act, a similar statement would appear to be quite as appropriate to Alberta.

REFERENCES FOR CHAPTER II

¹P. F. Bargaen, The Legal Status of the Canadian Public School Pupil (Toronto: Macmillan Company of Canada, 1961); Frederick Enns, The Legal Status of the Canadian Public School Board (Toronto: Macmillan Company of Canada, 1961).

²Queen's Printer, The School Act, R.S.A. 1964. C. 297.

³John E. Cheal, Harold C. Melsness and Arthur W. Reeves, Educational Administration: The Role of the Teacher (Toronto: Macmillan Company of Canada, 1962), p. 47.

⁴Enns, op. cit., pp. 1-8 and 66-111.

⁵Queen's Printer, op. cit.

⁶Robert R. Hamilton and E. Edmund Reutter, Jr., Legal Aspects of School Board Operation (New York: Bureau of Publications, Teacher College, Columbia, 1958), p. 7.

⁷Enns, op. cit., pp. 7-8.

⁸R. L. Lamb, Legal Liability of School Boards and Teachers for School Accidents (Ottawa: Canadian Teachers' Federation, 1959); P. F. Bargaen, The Legal Status of the Canadian Public School Pupil (Toronto: Macmillan Company of Canada, 1961).

⁹Enns, op. cit., pp. 97-98.

¹⁰Queen's Printer, op. cit., Part VI, pp. 55-72.

¹¹Enns, op. cit., p. v (abstract).

¹²Cecil W. Roebathan, "A Study of the Operation of Anglican School Boards in Newfoundland" (unpublished Master's thesis, University of Alberta, Edmonton, 1962), p. 109.

CHAPTER III

GUIDELINES AND CRITERIA FOR STUDYING THE OPERATION OF ALBERTA SCHOOL BOARDS

It is the purpose of the first section of this chapter to formulate and to substantiate basic guidelines that should govern the operation of school boards. In the design of this study no attempt was made to apply statistics to prove the superiority of the guidelines established. The consistent and accepted approval of authorities in school administration was considered sufficient evidence of their validity.

It is the purpose of the next section of this chapter to evolve specific criteria from the established guidelines for studying the operation of Alberta school boards.

I. ESTABLISHMENT OF GUIDELINES

Policies, Rules and Regulations

The school board as a policy making body. Authorities in school administration agree that the primary function of a school board should be policy making. Through legislating general policies the board determines the scope and quality of the educational program provided by the system. Cubberly states this clearly when he says:

The board's work, as the representative of the people, is to sit in judgment on

proposals, to determine general policy of the school system, and to see that the policies decided upon are carried out by the superintendent and his staff.¹

A similar point of view was expressed by members of the 1962 Canadian Education Association Short Course when they stated:

...the primary role of the school board should be to make policy with respect to buildings, budgeting, personnel, transportation, instruction and other materials.²

A survey of the Saskatoon Public School District contained the following recommendation in its report to the board: "That the board give increased attention to policy-making and the collection of policies in a register."³

That the school board should function as a policy making body was implied by Coutts when he stated:

It is the superintendent's function both to assist the school board or county education committee in establishing policies and to insure that such policies are wisely interpreted and applied.⁴

In The Alberta School Trustee, Swift had this to say:

To be successful and valuable a board must act as a unit, lay down careful and clear cut policies with trustees remembering that they have little or no authority except when in a meeting of the board.⁵

Myhre summarized in table form the values of a policy handbook as reported by board members. He found that board members and administrators agree that a policy handbook tends to promote consistency, continuity, and

stability of board action as well as to provide a ready reference to guide an employee's decision and actions in cases of doubt.⁶

Authorities such as Gibbs, Davies and Hosler, Reeder, Sears, and Hagman recommend that the school board should be primarily a policy-making body and should delegate executive functions to the superintendent, the principals, the business employees, the teachers, and other school employees.⁷

The Alberta School Trustees' Association handbook states: "The trustees' responsibility is to develop policy and the teachers' or administrators' responsibility is to carry it out."⁸

Policies, as defined in Chapter I, are guidelines or principles adopted to assist the administration to establish the limits of its action. This implies a duration of time. Hagman states:

It (a policy) may be short-term in nature although the adoption of long-term policies adds to the stability and efficiency of the school organization.⁹

Stapley in speaking of policy revision concludes:

Legally, of course, policy is revised each time the board takes any official action which amends in any way its prior statement of policy. Consequently, provision should be made for continued indexing of the minutes and the policy statement should be consulted regularly whenever questions requiring action arise. However constructive a device the annual policy revision session may be, in actual practice,

the policy statement is revised at each meeting of the board.¹⁰

Thus it is evident that policies should be developed with a long term purpose in view, but also must be continuously reviewed and revised as need becomes apparent.

Expert opinion seems to justify the first guideline. Legislative powers and functions belong to the school board. Executive powers and functions belong to the administrative staff.

Rules and regulations should be adopted. Once policies have been adopted, rules, and regulations related to these policies should be established and recorded.

Moehlman describes rules and regulations as "means of procedure developed from policy." He indicates that they are always developed by the superintendent and his staff and adopted by the board. He states that written policies protect the board, the people, and the professional staff.¹¹

A survey report by the Division of Educational Administration, University of Alberta, to the Saskatoon Public School District Board recommended "that the formulation of regulations required to implement the board's policies be assigned to the board's executive officer."¹²

Myhre states:

The rules and regulations of a school board are, in law, administrative provisions. They are the result of the exercise of a board's quasi-legislative powers. A board of trustees may delegate its duty of drafting certain rules and regulations, but for these to become effective, they must be adopted officially by the board.¹³

Reeder and Hagman concur in this point of view concerning the need for officially adopting and publishing rules and regulations.¹⁴

The second guideline follows from the foregoing discussion. Rules and regulations should be adopted related to those matters on which the board has established policy.

Relation to Administration and Staff

Recommendation and appointment of staff. Authorities agree that the responsibility for nominating both teaching and non-teaching school personnel belongs to the superintendent, and that the power of appointment rest with the board of education.

The American Association of School Administrators indicates that the superintendent should nominate all certificated and all non-certificated employees, and that the board should appoint or reject employees on the nomination of the superintendent.¹⁵ Stapley, Hagman, and Reeder among others, concur in this point of view.¹⁶

Reeder explains why the superintendent should be responsible for nominating personnel. He states that because of the preparation and educational experience of the superintendent he best knows the qualifications needed for each teaching position. The superintendent should be responsible for investigating the qualifications of and for recommending all teachers for appointment by the board.¹⁷ "...Furthermore, if the administrator has no voice in the selection of those whom he directs, employees are likely to be indifferent about cooperating with him."¹⁸

A survey report by the Division of Educational Administration, University of Alberta, to the County of Sturgeon recommended that the superintendent of schools, although appointed and employed by the Department of Education, should be the executive officer in instructional matters and should have duties over: "Selection, allocation, promotion and dismissal of staff."¹⁹

From the foregoing discussion, the third guideline is derived. The board should appoint both the teaching staff and the non-teaching staff upon the recommendation of the superintendent.

Statement of duties of personnel. Authorities agree that rules and regulations should contain a clear statement of the duties of the board's superintendent and

of its employees.

Rules and regulations outlining the duties of school personnel tend to prevent misunderstandings and minimize the possibility of conflict. Reeder makes it clear that rules and regulations should state the major powers and duties of the school board and of each employee.²⁰

A similar point of view was expressed by Prueter who stated:

I feel that the Department of Education should restate the functions of their superintendents and that school boards should set out carefully, in order of importance, the duties of their supervisory personnel.²¹

A study of school administration in the County of Sturgeon made detailed suggestions with reference to the recommended major powers and duties of the school committee, and of members of the administrative and supervisory staff. Several references were made in the report for the need to further clarify the duties and the responsibilities of the various supervisory and administrative personnel.²²

From this discussion follows the fourth guideline. The board's rules and regulations should contain a clear statement of the duties of its superintendent and of its employees.

The superintendent as educational leader. Specialists in school administration agree that the superintendent should be the educational leader of the community. That this is a task of great size and importance was indicated in the report of the 1954 Canadian Educational Association Short Course, University of Alberta, when it stated:

The progress of education in a democracy depends largely upon public support. In the long view, this support is a measure of the public's understanding of its educational system. Among the several great challenges facing the personnel of Canada's school board members, officials, teachers, and others is that of the development everywhere of enlightened interest and enthusiastic participation.²³

Flower, in a report of the Canadian Education Association - Kellogg Pilot Short Course, stressed the importance of the leadership function of the superintendent as a valuable consultant to the board in formulating local educational policy when he stated:

He (the superintendent) can acquaint the board with underlying principles of curriculum planning and school organization, with current trends in educational thought and procedures, and with generally accepted standards in teaching techniques, pupils' progress, and instructional supplies. In the light of these principles he should be prepared to furnish the board at any time with an evaluation of its school system and to make such recommendations as will promote maximum efficiency.²⁴

Goldring, while recognizing the important role that the superintendent plays in the improvement of the classroom instruction, stated:

In addition to instruction, it is a major responsibility for him (the superintendent) to plan, organize, systematize, and administer education in the area, so that as far as is possible children will receive adequate education in accordance with modern concepts of growth, development and instructional policies. Inevitably, he is required to give advice and information not only to his employing board but to the public at large.²⁵

...the new professional leader in education must be a social planner and thinker.²⁶

Rees emphasized this educational leadership responsibility when he discussed the duties of the superintendent. The superintendent should furnish leadership to teachers who work directly with students in all phases of their development but in addition to this responsibility, he must not forget the very important aspect of his work, adult education, which includes "the general public, parents, ratepayers and their representatives, the school boards and school committees."²⁷

Byrne, in addressing the Annual Conference of the Alberta Department of Education stated:

...he (the superintendent) is to provide advice to the board with which he works. He is to occupy a position of leadership with respect to the staff and to take such measures as he deems effective towards the improvement of instruction....He is expected to further the interests of public education in the communities within his divisional area.²⁸

Lorimer makes it clear that the superintendent must be prepared to give educational leadership to both teachers

and community.²⁹

The foregoing quotations substantiate the point of view that the superintendent should be the professional leader not only of the school and the school board but of the community. Davies and Hosler,³⁰ writing for the American Association of School Administrators, present a similar view, as does Stapley when he states:

His duties (superintendent's) are to provide information, to make suggestions, and to give advice to the board; and to direct the affairs of the school system as authorized by the Board.³¹

The School Act, in defining the duties of the provincially appointed superintendent of schools, lists as one of his duties: "The superintendent shall: confer with the board of the division and advise the board concerning the educational problems and needs of the division."³²

Olsen emphasizes throughout his study that the superintendent is the professional advisor to the board.³³

From the foregoing is established the fifth guideline. The superintendent should be the educational leader of the board, the school, and the community.

Group participation in planning and problem solving.

Most authorities in public education agree that those who are effected by a decision should participate in making the decision.

In the following terms, Rees helps us to understand the nature of democratic school administration.

A particularly important aspect of democratic administration is that those people who are affected by any policy should have some part in its formulation. Their assistance should be sought in collectively thinking through the solution to the confronting problem.³⁴

Myhre supports the practice of group involvement in planning and problem solving when he concludes:

It is generally accepted that policies are likely to be most effective if they represent the cooperative efforts of a great many of the persons affected by them.³⁵

Byrne in discussing the topic, "Personnel Policies of School Boards" states:

...the board might well consider consulting with committees of teachers before arriving at policies of staff control. Such opportunities provide teachers with a share of planning those policies which affect their welfare most intimately.³⁶

The American Association of School Administrators discusses this principle and its advantages when it is applied to educational planning:

Cooperative planning by its very nature maintains a two-way flow of ideas between the school and the public. When the staff and the public share in the process of setting up that program, both find it possible to see beyond the present and its difficulties.³⁷

This cooperative study and planning should include all phases of the school program. Campbell, in discussing

how to improve policies and policy-making procedures points out that many school administrators today are recommending policies to school boards that have been endorsed by school staff members and patrons.³⁸ Reeder discusses the formulating of rules and regulations by utilizing committees composed of janitors, teachers, and principals.³⁹

Meece and Spain strongly recommend that the superintendent should utilize his staff in preparing the budget.⁴⁰

It follows then that school personnel should help in determining the amount and kind of school supplies to be purchased, and that teachers' representatives should be consulted in solving teacher welfare problems.

Hagman points out when discussing school building plans:

In short it can be said that the school building should be functional in the school undertaking, that administrators, teachers, board members, parents, architects, and others should plan together to build a school which will contribute to the work of the school in living.⁴¹

From the foregoing discussion the sixth guideline can be stated. Persons who are affected by a decision and its consequences should be invited to participate in the thinking involved prior to the decision being made.

Relation to Community

School boards and public relations policy. Members of the board are charged with the responsibility for the promotion of school public relations. McInnis quite adequately describes this responsibility:

Every school board should have a policy on how it proposes to keep the public informed of the school activities and programs and should provide guides for executive action to achieve this dissemination of information. Frequently, boards neglect the ratepayers except to appeal for support for a money by-law. The schools 'belong to the people' and the people, therefore, have a right to know how they are being operated. The public will become informed in any case but frequently by indirect methods that produce undesirable attitudes. It is more judicious policy, for the promotion of improvement in education, to adopt a routine procedure of assuring that the people of the community become intelligently and completely informed. Familiarity with the work and policy of the school is the best assurance of continuous and rational support.⁴²

Reeder and Hagman agree that the first responsibility of the school board is to approve the superintendent's recommendations of a public relations policy.⁴³ Once the public relations policy is approved, its execution becomes the responsibility of the superintendent and staff according to the American Association of School Administrators.⁴⁴

It was pointed out in the foregoing discussion that an accounting of schools should be made to the public. The Handbook of the Alberta School Trustees' Association in outlining the duties of a "good trustee" supports this view.

A good trustee should:

7. Disseminate information on the running of the schools by holding meetings, attending and speaking at Home and School meetings, and by making use of the press.

10. Report to the electors at annual meetings, on annual conventions and short course proceedings.⁴⁵

Hagman indicates the importance of informing the public when he states:

The active interest of a large part of the community in its school system is the best assurance of developing and maintaining satisfactory schools. As direct representatives of the community, the board member is accountable to it for the efficient operation of the system. If the community depends upon his reporting to it on the state of the schools, both the board member and the school administration will be impelled toward better performance of their duties.⁴⁶

It follows then that the public should be kept informed concerning the schools' purposes, accomplishments, conditions, and needs.

Meece and Spain point out that the board must be sensitive to the needs of the local district, to the desires of the community, and to the criticisms of its schools.⁴⁷ Hagman and Bemis make clear that school board members have an obligation to represent the community as elected spokesmen, and also to make an accounting of the school to the community. To do this, the board, working through the superintendent and his staff, must develop and utilize various practices for determining the attitudes and

opinions of the public.⁴⁸

Davies and Hosler list the following techniques as means for determining public attitudes:

1. Lay advisory committees to the board of education.
2. Open board meetings with the public and press invited.
3. Open forums.
4. Public opinion polls.
5. Public contacts of the individual board members.
6. Parent-teacher association.⁴⁹

In his nation-wide study of lay advisory committees, Hull found that they were very valuable as a means both for determining public attitudes and for disseminating school information.⁵⁰

The seventh guideline follows from the foregoing. The school board should adopt a public relations policy upon the recommendation of the superintendent and should delegate responsibility for its execution to the superintendent and to the staff.

School board members and educational leadership.

There is general agreement among students of school administration that school board members must interpret the objectives and programs of the schools to the community. This involves leadership and stimulation as well as explanation and justification. The school board member by nature of his position should be well informed and enthusiastic about the schools.

The Handbook of the Alberta School Trustees' Association states this very clearly when listing the duties of a "good trustee": "He (the trustee) should 'endeavour' to give leadership in education to parents."⁵¹

Sparby suggests the board is cast in a dual role:

...It is expected to cooperate with the provincial authority in maintaining the province-wide minimum, ... it is expected to provide the level of service desired by its constituency.⁵²

It is in the latter of these roles that opportunities to exercise leadership occur.

Stapley makes it clear that school board members should provide educational leadership. When discussing the need for securing public support for the educational programs he states: "It is the task of the school board to stimulate thought and to create support for a sound program."⁵³

The National Education Association, in recognizing the need for community educational leadership by board members states:

The proverb 'Where there is no vision people perish' is as true today as it ever was. Upon board members falls the heavy responsibility for building community schools close to the heart of the American people.⁵⁴

Thus the eighth guideline is developed. School board members should provide lay educational leadership.

Board meetings open to the public. School board meetings, with few exceptions, should be open to the public. Andrew's attitude is typical. He says:

Although only a small number of citizens, if any, are attracted to most of the meetings of the board, every encouragement should be extended. It should be known where and when meetings are held and that advance agenda materials are available on request."⁵⁵

The American Association of School Administrators makes it clear that school board business is community business and therefore should be transacted in public.⁵⁶

There are exceptions to this rule, as indicated by Sparby when he states that it may be necessary to meet as a committee of the whole when a board must consider intimate personal matters relating to an employee or if a financial benefit is to accrue to a board by not making its intentions known to the public too soon.⁵⁷

A similar view is expressed by Stapley: "There will, of necessity, be executive sessions not open to the public. Regular meetings, however, should be scheduled for a specific time at a specific place."⁵⁸

Hagman and Andrews make it clear that all persons including representatives of the press as well as petitioners and delegations should be welcome at board meetings.⁵⁹

Legally, board meetings must be open to the public.

The Alberta School Act, 1964, states: "Every meeting of the board shall be open and the board shall make reasonable provision for public accommodation."⁶⁰

After studying expert opinion, Roebathan concluded: "As an indispensable aid to good public relations, writers recommend that all board meetings be open to the public."⁶¹

With few exceptions, it is clear that school board meetings must be open to the public and adequate facilities provided for those who wish to attend. This is the ninth guideline.

The community use of school buildings. There is general agreement among authorities in school administration and public relations that school buildings and grounds should be made available for community use.

The Canadian Education Association short course report lists a number of questions in its evaluation of the school in the community that helps to clarify thinking on this matter.

Is the school one of the focal points of the community?

Is the school designed to fulfill its function as a community unit?

Is suitable equipment provided to accommodate community interest and needs?

Is there cooperation between schools and local groups and parent organizations?

Is there an adult educational program?

Is there a definite policy with respect to the use of school facilities by the community?⁶²

Reeder indicates that the use of school buildings by the community is a growing trend:

Within the last two decades, there has been well-defined movement toward making the school the center of community life. Thus today, the school buildings are being opened for the use of the general public during the evenings and at other times when the work of the regular pupils will not be hindered.⁶³

The American Association of School Administrators emphasizes the value of making school buildings available for public use:

The stage is set for good working contacts with the whole community when the superintendent and the board have developed a policy for allowing civic and educational groups free use of the school plant and of charging only necessary operating costs for use by parents, professions, business, patriotic, and labor groups.⁶⁴

If the schools and their facilities are to be made available to the community, the school board should adopt written rules and regulations governing their use. Reeder points out that such rules and regulations should prescribe the method of securing permission, the conditions of use, and the rental fees, if any, which must be paid.⁶⁵

His view is similar to the American Association of School Administrators when it states:

The extent to which the school is used by the community groups and the conditions under which its use is permitted must be governed by school board policies.⁶⁶

Cheal, Melsness, and Reeves point up the value of using the school as a community center.

...since these activities are the means of bringing many people into the school, they (school activities) can help to develop an appreciation of the school's place in the community, and a greater interest in the provision of adequate school facilities.⁶⁷

Guideline number ten has been established. School buildings and grounds should be made available for community use.

Working Procedures and Related Matters

Business procedures. Much has been written concerning the methods and procedures used in conducting school board business. Authorities unanimously agree that the school board should establish functional, orderly, business procedures. These procedures should be adequate, but not restrictive. They should be constant, but they should be revised when need is apparent.

Andrews in discussing the importance of good working procedures states: "Appropriate procedures minimize time-wasting, confusion, and misunderstanding, and encourage a straightforward, enlightened attack on the business at hand."⁶⁸

Swift in speaking of rules of procedure states:

A board has two choices open to it:

- (a) By motion a board may adopt some standard rules to abide by.

(b) A board may make its own set of rules if it so wishes. If neither is done then a board has no rules. This is an undesirable situation and a tendency may develop to follow certain (common-law) rules which in reality carry no authority other than common consent.⁶⁹

Andrews points out that the school board should have an "agenda or order of business which should follow an established pattern."⁷⁰

Davies and Brickell recommend an order of business which involves a distinction between items requiring action or decision by the board and those requiring no action. The no-action items are the ones which will require preliminary consideration and ones which will eventually appear in the action part of the agenda.⁷¹

Hagman makes it clear that the board's rules and regulations should include the order of business.⁷²

Andrews suggests that advance materials (which include the agenda, administrative memoranda of recommendations) should be sent out to board members two or three days in advance of the meeting. Trustees should study these advance materials prior to coming to the board meeting.⁷³

This practice, along with several others, is endorsed by Reeder and Hagman as a means of expediting meetings.⁷⁴

From the foregoing it becomes clear that the school board should establish functional and adequate business procedures. This is the eleventh guideline.

School board committees. School board committees fall into three main types: standing committees, special committees, and committee of the whole. There appears to be consensus that school boards should not operate under the so-called standing committee system. Under the committee system it is generally customary for matters of policy to be discussed only by the committee rather than by the school board as a whole. Reeves points out that the committee system is organized so that the school board is divided into a number of smaller ones which make recommendations to the full board. The board then acts as a "rubber stamp" adopting the recommendations without consideration, or else the members of the board require the committee(s) to repeat the procedures again, which is wasteful of time and energy. He also points out that the committee is likely to usurp the executive authority of the superintendent.⁷⁵

Rees, after reviewing the literature, concluded:

The use of standing committees...has been found to produce less rather than greater unity in the performance of school board work and, if generally adopted by school divisions, will, according to students of administration, be a divisive factor in administrative relationships.⁷⁶

One writer suggests that standing committees are generally regarded as "stumbling" blocks to school board effectiveness.⁷⁷ Sparby also warns of the inherent dangers of boards using standing committees, but suggests the potential usefulness of special committees. He states:

Special committees can be used as a vehicle for making available to the superintendent and his staff any specialized knowledge or skills which individual board members may possess. If it is clearly established that such committees are set up to deal with specific situations and that they are temporary committees, the most serious dangers inherent in the standing committee system, that of vested interests can be avoided.⁷⁸

Another writer suggests that the only standing committee a board should normally have is a committee of the whole.⁷⁹

In the following words, Sears summarizes the conclusions of various authorities as to how school boards should function: "All board legislation should be based upon the deliberations of the entire board, rather than being referred to standing committees."⁸⁰

Expert opinion, both United States and Canadian, seems to justify the twelfth guideline. A school board should act as a committee of the whole. Special-temporary committees may be used to deal with specific situations.

Time, place, and duration of meetings. Consensus among school board specialists is that there should be a definite time and place for school board meetings. Also, attention should be given to fixing the length of board meetings.

Reeder says: "The board should fix a regular time and place for its meetings."⁸¹

Goldhammer states:

The knowledge gained from research in the dynamics of decision-making groups indicates that a school board probably becomes less efficient and increasingly less able to make decisions as the meeting is prolonged. Few if any meetings should last more than three hours, and it is undoubtedly true that the efficiency of the group tends to decrease after two hours of meeting time.⁸²

From expert opinion and practice the thirteenth guideline is formulated. There should be a regular time, place, and length of time for school board meetings. Special meetings should be held only when necessary, and should be confined to the purposes for which the meetings were called.⁸³

Yearly agenda and content of meetings. Time should be allocated so that educational matters are given proper consideration at each board meeting during the year.

In this regard, Andrews recommends:

As far as possible boards should establish a yearly agenda of meetings. This practice ensures that deadlines for major business

matters are met (building programs, supply tenders, negotiations, budget....and the like) and ensures planned consideration of those educational matters which are selected for study.⁸⁴

One of the most authoritative studies flatly states that more time at board meetings should be spent on educational programs and procedures than on business detail.⁸⁵

Sletten found from his Montana study that seventy-four per cent of the board members and sixty-two per cent of the superintendents were of the opinion that as much time at board meetings should be devoted to the educational program as to financial matters.⁸⁶

Expert opinion and practice would indicate that the board should follow a yearly agenda, and that content of board meetings should be planned so that educational and business matters are given approximately equal time. This is the fourteenth guideline.

II. ESTABLISHMENT OF CRITERIA

Policies, Rules and Regulations

The first guideline developed in the previous section stated that the legislative powers and functions belong to the school board. The executive powers and functions belong to the administrative staff. The following criteria were established as measures of the

extent to which this guideline holds in the operation of Alberta school boards.

Criterion 1(a). The school board should legislate policy and delegate the responsibility for the execution of all policies to the administrative staff.

Criterion 1(b). The administrative staff should be responsible for the performance of all executive duties of the school system.

Criterion 2. Since the school board should delegate authority to the administrative staff, this implies that the superintendent and secretary-treasurer should have the power of discretion over eventualities not covered by policies, rules, and regulations.

Criterion 3. The school board should establish a long term maintenance program.

Criterion 4. From the point of view of good business procedures, goods should be purchased locally only when they can be bought as cheaply or more cheaply locally.

Criterion 5. All school board members should accept and support the policy decisions of the board.

Criterion 6. Policies, rules, and regulations should be revised continuously as need for changes arise.

The second guideline is that rules and regulations should be adopted related to those matters on which the board has established policy. From this guideline the

following criteria were established:

Criterion 7. The school board should adopt rules and regulations related to policies.

Criterion 8. The rules and regulations adopted by the board should be recorded.

Criterion 9. Policies and/or rules and regulations should be made available to school personnel and to the public.

Relation to Administration and Staff

The third guideline is that the board should appoint both the teaching staff and the non-teaching staff upon the recommendation of the superintendent. From this guideline were established the following criteria:

Criterion 10. The superintendent should nominate and recommend the appointment of all principals.

Criterion 11. The superintendent should nominate and recommend the appointment of all teachers.

Criterion 12. The superintendent should nominate and recommend the appointment of all non-teaching employees.

The fourth guideline is that the board's rules and regulations should contain a clear statement of the duties of its employees. From this guideline were established criteria thirteen and fourteen.

Criterion 13. The school board should develop a written list of duties of the superintendent and of its

employees.

Criterion 14. The superintendent should be responsible for the supervision of both teaching and non-teaching personnel.

The fifth guideline is that the superintendent should be the educational leader of the board, of the school, and of the community. From this guideline was established criterion fifteen.

Criterion 15. The superintendent should be the professional advisor to the school board.

The sixth guideline is that persons who will be affected by a decision and its consequences should be invited to participate in the thinking involved prior to the decision being made. From this guideline the following criteria were established:

Criterion 16. Groups or individuals affected by board decisions should have an opportunity to provide information and to make suggestions before policies are created.

Criterion 17. School personnel should be invited to help determine the budget.

Criterion 18. School personnel should help in determining the amounts and kinds of supplies to be purchased.

Criterion 19. Teacher representatives should be consulted on teacher welfare problems.

Criterion 20. Staff members, laymen, and students should participate in planning a school building.

Criterion 21. Members of the professional staff and laymen should have a part in the study and planning for the improvement of the instructional program.

Relation to Community

The seventh guideline follows: the school board should approve a public relations program upon the recommendation of the superintendent and should delegate the responsibility for its execution to the superintendent. From this, the following criteria were established:

Criterion 22. The superintendent should serve as the executive of the public relations program.

Criterion 23. Provision should be made for informing the public.

The eighth guideline is that the board should provide lay educational leadership. From this the following criteria were established:

Criterion 24. The school board should encourage the participation of laymen and staff personnel in studying the needs of the community and in the planning to meet these needs.

Criterion 25. The school board should provide

ways for determining attitudes and opinions of the people of the communities by such means as:

- (1) lay advisory committees
- (2) open board meetings

The ninth guideline is that school board meetings must be open to the public and adequate facilities should be provided for those who wish to attend.

Criterion 26. With few exceptions, board meetings should not only be open to the public, but all citizens and interested groups should be encouraged to attend.

Guideline ten is stated as criterion twenty-seven.

Criterion 27. School buildings and grounds should be made available for community use.

Working Procedures and Related Matters

The eleventh guideline is that the board should establish functional and adequate business procedures. From this guideline the following criteria were constructed:

Criterion 28. The board should establish good working procedures in conducting its meetings.

Criterion 29. The board should establish an order of business for its meetings; only under exceptional circumstances should it deviate.

Criterion 30. Business contracts and agreements

should be made only with the knowledge and approval of the entire board.

Criterion 31. Copies of the minutes of the previous meeting, an agenda, and any other enclosures should be sent to each board member well in advance of each meeting.

Criterion 32. Minutes from board meetings should be complete and accurate.

The school board should act as a committee of the whole. Special-temporary committees may be used to deal with specific situations. Criteria thirty-three and thirty-four were established from guideline twelve.

Criterion 33. Special-temporary committees should be used only for making available to the superintendent or secretary-treasurer specialized knowledge or skills.

Criterion 34. No standing committees should be appointed within the board.

The thirteenth guideline is that there should be a regular time, place, and length of time (not more than three hours) for school board meetings. Special meetings should be held only when necessary and should be confined to the purposes for which the meetings were called.

Criterion 35. The school board should have regular meetings in a room adequate in size to accommodate the board and anticipated visitors.

Criterion 36. Regular board meetings should be held.

Criterion 37. Special meetings should be held only when necessary and should be confined to the purpose for which the meetings were called.

Criterion 38. School board meetings should rarely be longer than three hours.

The fourteenth guideline suggests that the board should follow a yearly agenda and that the content of board meetings should be planned so that educational matters and business matters are given equal time. From this guideline the following criteria were established.

Criterion 39. The school board should follow a yearly agenda (calendar).

Criterion 40. Approximately equal time should be given at board meetings to educational and business matters.

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CHAPTER IV

THE OPERATION OF ALBERTA SCHOOL BOARDS IN TERMS OF THE CRITERIA ESTABLISHED

This study of the operation of Alberta school boards was undertaken, as indicated in Chapter I, to determine how school boards actually operate, and to determine the extent to which school boards conform to the guidelines or standards of operation recommended by authorities in educational administration. The primary data for the study were obtained by sending questionnaires to all school superintendents in the twenty-eight counties and thirty school divisions in Alberta.

It is the purpose of this chapter to present the data received from the questionnaires that were returned by the superintendents.

Table I indicates that all fifty-eight school superintendents responded.

I. POLICIES, RULES, AND REGULATIONS

The School Board as a Policy-Making Body (Criterion 1a)

Each superintendent was asked to indicate the degree to which his school board might be classified as a policy-making body.

TABLE I

DISTRIBUTION OF RESPONSES FROM SCHOOL SUPERINTENDENTS
IN DIVISIONS AND COUNTIES IN ALBERTA

| School Units | Number of Superintendents | Number of Superintendents Responding | Percentage of Superintendents Responding |
|--------------------------|---------------------------|--------------------------------------|--|
| School divisions | 30 | 30 | 100 |
| County school committees | 28 | 28 | 100 |
| All school units | 58 | 58 | 100 |

Table II shows the extent to which school boards conform to their function as policy makers.

TABLE II

EXTENT TO WHICH SCHOOL BOARDS ARE POLICY-MAKING
BODIES, AS REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|--|--|----------|-----------|
| | Divisions | Counties | All Units |
| Board is primarily a policy-making body, delegating responsibility for execution | 23 | 14 | 19 |
| Board makes policies but reserves the right of execution of some of them | 57 | 61 | 59 |
| Board makes few or no policies | 20 | 25 | 22 |

Table II shows that nineteen per cent of all superintendents described their school boards as primarily policy-making bodies that delegated the responsibility for the execution of all policies to the superintendent or secretary-treasurer. However, fifty-nine per cent of all superintendents reported that their boards make policies but reserve the right of execution of some of them. The table further indicates that twenty-two per cent of all school boards make few or no policies.

In the matter of policy making, Table II compares school division boards with county school committees. Of the school boards reported as primarily policy-making bodies who delegate responsibility for the execution of policies, a larger percentage of division boards than county school committees were in this category.

The Administrative Staff and Executive Duties (Criterion 1b)

The administrative staff should be responsible for the performance of all the executive duties of the school system.

In preparing the budget, all boards make use of either the secretary-treasurer or the superintendent or both. Forty-three per cent of the superintendents reported that the superintendent, secretary-treasurer,

and the board all participated.

The interviewing and recommending of candidates for appointment is an executive function. Over ninety per cent of the superintendents recommend principals and teachers for appointment. No school janitors are appointed on the recommendation of the superintendent only.

Twenty-six per cent of all superintendents are responsible for the supervision of all school personnel; eighty-four per cent of all school boards participate to some extent in the supervision of personnel.

Superintendents indicated by their comments in reply to the questionnaires that they are given almost complete responsibility for the supervision of professional employees. Few boards delegate this degree of responsibility when it comes to non-professional employees.

Administrative Staff and Powers of Discretion (Criterion 2)

The Alberta superintendent and secretary-treasurer are given considerable freedom to decide on matters not covered by board policy or by rules and regulations. Table III reveals that seventy-nine per cent of all superintendents and/or secretary-treasurers have authority to decide on some matters not covered by board policy. Only twenty-one per cent must take all matters not

covered by policy to the school board.

There appears to be no notable difference between divisions and counties with regard to the degree that officers of the board are permitted to use their discretion in matters of decision not covered by board policy.

TABLE III

EXTENT TO WHICH THE SUPERINTENDENT OR SECRETARY-
TREASURER MAY EXERCISE DISCRETION ON MATTERS
NOT COVERED BY BOARD POLICY, AS REPORTED
BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|--|--|----------|-----------|
| | Divisions | Counties | All Units |
| The superintendent and/or the secretary may decide upon matters about which no specific provision has been made in policy or regulations | 10 | 7 | 9 |
| The secretary and/or superintendent may decide upon some matters not covered in policy or regulations | 73 | 68 | 70 |
| All matters not covered in policy or regulations must be taken to the board | 17 | 25 | 21 |

The Building and Maintenance Program (Criterion 3)

The school board should establish a planned long-

term maintenance program. Each superintendent was asked to indicate the degree to which his board has a planned maintenance program.

Table IV indicates that better than nine-tenths (92 per cent) of Alberta school boards have some type of a building maintenance program, although almost one-half (47 per cent) of these programs were operating to a limited degree. Eight per cent of the boards have no maintenance program and make repairs only when necessitated.

Eleven per cent more superintendents of divisions than counties reported their boards as having a maintenance program complete in every respect.

TABLE IV

EXTENT TO WHICH SCHOOL BOARDS HAVE A PLANNED MAINTENANCE PROGRAM, AS REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|---|--|----------|-----------|
| | Divisions | Counties | All Units |
| Yes - in every respect | 50 | 39 | 45 |
| Yes - to a limited degree | 43 | 50 | 47 |
| No - repairs, improvements, and maintenance are made only when necessitated | 7 | 11 | 8 |

Local Merchants and School Business (Criterion 4)

Superintendents were asked to report on the purchasing practices of their school boards. Five per cent of the superintendents indicated that their boards never purchased locally. Fifty per cent of all boards give school business to local merchants only when goods can be bought as cheaply or more cheaply locally. Thirty-six per cent of all school boards give school business to local merchants whenever school prices are not greatly in excess of prices obtainable elsewhere. Only one board, that of a school division, patronized local merchants regardless of price.

When school boards were classified according to divisions and counties, little difference was apparent in their purchasing practices.

Board Member Acceptance and Support of Board Policy (Criterion 5)

Table V indicates that forty per cent of all superintendents reported that quite often at least one board member takes a stand outside of the board room opposed to board policy. Forty-three per cent of the county superintendents reported this to be the case; thirty-three per cent of the division superintendents reported this to be the case with their boards.

TABLE V

EXTENT TO WHICH BOARD MEMBERS ACCEPT AND SUPPORT
BOARD POLICY, AS REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|---|--|----------|-----------|
| | Divisions | Counties | All Units |
| All board members do | 67 | 57 | 60 |
| Quite often at least one board member will take a stand outside the board room opposed to board policy. | 33 | 43 | 40 |

The Revision of Policies, Rules and Regulations (Criterion 6)

Authorities in school administration indicate that school boards should revise their policies, rules and regulations continuously as need for changes arise.

Twenty-seven of the boards studied in this investigation did not keep separate records of their policies, and/or rules and regulations. A breakdown of the thirty-one boards (54 per cent) that did keep separate policies and/or rules and regulations is given in Table VI. Thirty-five per cent of the boards revised their separately recorded policies and/or rules and regulations continuously during the last school year as reported by superintendents. Twelve per cent of the boards last revised or made additions to their policies, two years ago. No superintendent indicated that his board had last made revisions

to its policies three years ago. Seven per cent of the boards had last made additions to, or revisions of their policies four years or more ago.

As indicated in Table VI, the continuous revisions of policies, rules and regulations is more characteristic of counties than of school divisions.

TABLE VI

FREQUENCY OF REVISIONS OR ADDITIONS TO SEPARATELY
RECORDED POLICIES, RULES AND REGULATIONS, AS
REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|-----------------------------------|--|----------|-----------|
| | Divisions | Counties | All Units |
| Continuously during the last year | 27 | 43 | 35 |
| Two years ago, approximately | 17 | 7 | 12 |
| Three years ago, approximately | 0 | 0 | 0 |
| Four years or more ago | 10 | 4 | 7 |

Note: The thirty-one school boards cited in this table were those that had separately recorded policies, rules and regulations as reported by superintendents.

The Adoption of Rules and Regulations (Criterion 7)

Table VII reveals the extent to which school boards have rules and regulations related to policies. Only seventeen per cent of all boards have rules and regulations

related to the most important policies, and eighty-three per cent have some rules and regulations related to the most important policies.

There are eight per cent more counties than divisions that have rules and regulations related to their policies.

TABLE VII

EXTENT TO WHICH SCHOOL BOARDS HAVE RULES AND
REGULATIONS RELATED TO POLICIES, AS
REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|--|--|----------|-----------|
| | Divisions | Counties | All Units |
| Board has rules and regulations related to the most important policies | 13 | 21 | 17 |
| Board has some rules and regulations | 87 | 79 | 83 |
| Board has no rules and regulations | 0 | 0 | 0 |

The Recording of Policies, Rules and Regulations

(Criterion 8)

Table VIII indicates that all boards record their policies and rules and regulations in some manner. Practice is about equally divided between recording policies and/or rules and regulations in minutes only and recording them separately.

The table reveals that forty-six per cent of the school boards record policies and/or rules and regulations in minutes only. Separate records are kept by fifty-four per cent of the boards.

TABLE VIII

PRACTICES FOLLOWED BY SCHOOL BOARDS IN RECORDING
POLICIES AND/OR RULES AND REGULATIONS,
AS REPORTED BY SUPERINTENDENTS

| Item | Percentage of All School Boards Conforming |
|---------------------------|---|
| Recorded in minutes only | 46 |
| Separate records are kept | 54 |
| None is kept | 0 |

The Making of Policies, Rules, and Regulations Available
to Personnel (Criterion 9)

Superintendents reported that several different methods are used to make school board policies and regulations available to school personnel.

According to Table IX, mimeographed notices (76 per cent) are the most frequently used method of making rules and regulations available to school personnel. Handbooks are used by fifty-four per cent of all boards. County school committees tend to use both mimeographed notices and handbooks more than divisional boards.

TABLE IX

PRACTICES FOLLOWED BY SCHOOL BOARDS IN INFORMING
PERSONNEL OF RULES AND REGULATIONS, AS
REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|------------------------------------|--|----------|-----------|
| | Divisions | Counties | All Units |
| By handbooks | 53 | 61 | 54 |
| By mimeographed notices | 67 | 82 | 76 |
| By use of bulletin boards | 0 | 4 | 2 |
| By book kept in secretary's office | 10 | 7 | 8 |
| By word of mouth | 20 | 7 | 14 |
| Other | 3 | 11 | 7 |

II. RELATION TO ADMINISTRATION AND STAFF

The Selection of Principals (Criterion 10)

Criterion 10 states that the superintendent should nominate and recommend the appointment of all principals.

Table X shows the practices used to select school principals. Ninety-three per cent of all school boards appoint only principals recommended by the superintendent. Five per cent of all boards appoint some principals without the recommendation of the superintendent. In three per cent of the divisions, the selection of principals is left to a committee.

TABLE X

PRACTICES FOLLOWED BY SCHOOL BOARDS IN SELECTING
PRINCIPALS, AS REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|---|--|----------|-----------|
| | Divisions | Counties | All Units |
| The board appoints only principals recommended by the superintendents | 94 | 93 | 93 |
| The board appoints some principals without the recommendation of the superintendent | 3 | 7 | 5 |
| The board appoints all principals without the recommendation of the superintendent | 0 | 0 | 0 |
| Other, specify | 3 | 0 | 2 |

School division boards and county school committees do not differ in their practice of selecting principals.

The Selection of Teachers (Criterion 11)

Superintendents were asked to indicate how teachers were selected.

Data received from the questionnaires indicate that all boards appoint only teachers recommended by the superintendent.

The Selection of Janitors (Criterion 12)

Data received from the superintendents indicate that not a single school board appoints only those janitors recommended by the superintendent. Seventy-eight per cent of Alberta school boards appoint school janitors without the recommendation of the superintendent. Twelve per cent of the superintendents indicate that their boards appoint some janitors without the recommendation of the superintendent.

Written List of Duties of School Board Employees (Criterion 13)

Table XI gives the distribution of school boards that have developed a list of duties of their employees. Only fifteen per cent of all superintendents indicated that their boards have a list of duties for their employees. Another fifty-two per cent have a list of duties for some employees, while thirty-three per cent have no list of duties for any employees.

TABLE XI

THE EXTENT TO WHICH SCHOOL BOARDS HAVE WRITTEN LISTS OF
DUTIES OF THEIR EMPLOYEES, AS REPORTED BY
SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|----------------------------|--|----------|-----------|
| | Divisions | Counties | All Units |
| Yes, for all employees | 7 | 25 | 15 |
| Yes, for some employees | 70 | 32 | 52 |
| No written lists of duties | 23 | 43 | 33 |

The Supervision of Personnel (Criterion 14)

Only twenty-six per cent of the superintendents reported that their boards leave the supervision of all personnel to the superintendent. More than two-thirds (71 per cent) of the superintendents reported that their boards sometimes participate in the supervision or control of employees. Superintendents frequently mentioned that non-professional employees often receive instructions regarding their duties from persons other than the superintendent. This finding is similar to that of Finlay's.¹

TABLE XII

PRACTICES FOLLOWED IN THE SUPERVISION OF PERSONNEL,
AS REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|--|--|----------|-----------|
| | Divisions | Counties | All Units |
| The superintendent is authorized to place, supervise, transfer and to recommend dismissal of all employees | 30 | 21 | 26 |
| The board sometimes participates in the control of employees | 63 | 75 | 71 |
| Employees are given instructions about what they are to do by the board or any of its members | 7 | 4 | 3 |

The typical superintendent in a division appears to have little more authority in regard to the supervision of personnel than his counterpart in a county. Table XII indicates that school board members often become involved in the supervision of their employees.

In certain phases of school board operation an attempt was made to determine whether school boards that were characterized as confining their activities to policy-making actually do so.

The problem of the supervision of personnel was analyzed in terms of the degree to which boards were characterized as policy makers. Boards characterized as policy-making bodies would be expected to leave the executive function, the supervision of personnel, to the superintendent or secretary-treasurer. Boards characterized as policy-making but who reserved the right of execution of some of the policies for themselves would be expected to participate in the control and supervision of some of their employees.

Since the general character of Alberta school boards is one of policy-making but reserving the right of execution of some of the policies for themselves, it would be expected that a large percentage of the boards would participate in the supervision and control of their employees. Table XIII substantiates this prediction.

The Superintendent as Professional Advisor to the Board
(Criterion 15)

The superintendent should be the professional advisor of the school board. Data from the questionnaire showed that ninety-five per cent of all school boards frequently seek the professional advice of the superintendent. Only two boards (5 per cent) seldom do so, both of these being county school committees.

TABLE XIII

THE RELATIONSHIP BETWEEN SCHOOL BOARD POLICY
 MAKING AND THE SUPERVISION OF PERSONNEL,
 AS REPORTED BY SUPERINTENDENTS

| Item | Extent of School Board Policy-making | | |
|---|---|---|--------------------------------|
| | Board makes policies; superintendent and secretary-treasurer execute them | Board makes policies; executes some of them | Board makes few or no policies |
| The superintendent is authorized to place, to supervise, to transfer, and to recommend dismissal of all employees | 7* | 12 | 0 |
| The board sometimes participates in the control of employees | 10 | 43 | 5 |
| Employees are given instructions about what they are to do by the board or any of its members | 7 | 16 | 0 |

* The figures in this table are reported as percentages.

Participation in Policy Making (Criterion 16)

The participation of various people in the development of policies, rules and regulations is desirable.

Inspection of the data in Table XIV indicates that school boards utilize the services of many persons, including laymen, to a limited degree in the development of policies and rules and regulations.

Superintendents make policy recommendations to the school board. Table XIV indicates that three per cent of all boards fail to utilize the superintendent for this purpose.

TABLE XIV

PARTICIPATION IN POLICY MAKING BY THOSE AFFECTED, AS REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|--|--|----------|-----------|
| | Divisions | Counties | All Units |
| Superintendent (makes recommendations) | 93 | 100 | 97 |
| Principals (help by presenting their problems and ideas) | 77 | 96 | 86 |
| Teachers (help as individuals or in committees by presenting their problems and ideas) | 20 | 39 | 29 |
| Laymen (help by presenting their problems and ideas) | 13 | 21 | 17 |
| Other | 17 | 7 | 12 |

The problems and ideas of principals are utilized by eighty-six per cent of all school boards, while only twenty-nine per cent of the superintendents reported that their boards used the ideas and suggestions of teachers.

The use of teachers and laymen in policy making is not extensive in Alberta.

The Preparation of the Budget (Criterion 17)

Superintendents were asked to indicate who prepares the budget. The data with regard to who prepares the budget are presented in Table XV. In eighty-nine per cent of the cases the superintendent had budget responsibilities. Eight per cent of the superintendents reported that the secretary-treasurer prepares the budget unassisted. Only three per cent of the superintendents indicated that the staff participates in budget formation. However, it may be that the staff makes its recommendations known to the superintendent or principal who in turn acts upon their ideas and recommendations when assisting in the preparation of the budget. While superintendents do not possess authority with respect to the budget, they do participate extensively in its preparation.

From the data in Table XV there appears to be slightly more of a tendency in counties than in divisions for the superintendent and the secretary-treasurer to prepare the budget.

TABLE XV

EXTENT TO WHICH VARIOUS PERSONNEL PARTICIPATE IN
THE PREPARATION OF THE BUDGET, AS
REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|--|--|----------|-----------|
| | Divisions | Counties | All Units |
| The board or its committee | 0 | 0 | 0 |
| The superintendent and the board | 0 | 0 | 0 |
| The secretary-treasurer | 10 | 7 | 8 |
| The superintendent | 0 | 0 | 0 |
| The superintendent, the secretary-treasurer, and the board | 43 | 43 | 43 |
| The superintendent and the secretary-treasurer | 40 | 50 | 46 |
| Others | 7 | 0 | 3 |

Determining Amount and Kind of School Supplies (Criterion 18)

A question was asked to reveal who determines the amount and kind of school supplies to be purchased. Table XVI discloses that twelve per cent of the Alberta school boards participate to some extent in this executive function. Five per cent of all school boards perform this function alone while seven per cent of the school boards assist their superintendent with this task. Only fifteen per cent of all school boards utilize school committees consisting of persons who will use the supplies.

TABLE XVI

EXTENT TO WHICH SCHOOL PERSONNEL DETERMINE THE AMOUNT
AND KIND OF SCHOOL SUPPLIES TO BE PURCHASED, AS
REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|--|--|----------|-----------|
| | Divisions | Counties | All Units |
| Supply committees of school employees | 13 | 17 | 15 |
| Secretary | 17 | 14 | 15 |
| Superintendent | 23 | 14 | 19 |
| Superintendent and secretary-treasurer | 53 | 39 | 47 |
| Superintendent and principal | 30 | 35 | 33 |
| School board | 7 | 4 | 5 |
| The superintendent and board | 0 | 14 | 7 |
| Department heads and supervisors | 3 | 11 | 7 |
| Others | 3 | 25 | 14 |

An attempt was made to determine whether school boards that are characterized as policy-making actually do so when it comes to the matter of who determines the amounts and the kinds of supplies. Table XVII shows that no boards characterized as policy-making actually perform the task of determining the amounts and the kinds of supplies to be purchased. Only one superintendent (2 per cent), who indicated that his board was primarily policy-making, reported that his board worked with him in the

TABLE XVII

THE RELATIONSHIP BETWEEN WHO MAKES POLICY AND WHO
DETERMINES THE AMOUNT AND KIND OF SCHOOL
SUPPLIES, AS REPORTED BY
SUPERINTENDENTS

| Item | Extent to Which the School Board is a Policy-making Body | | |
|---|---|---|--|
| | Board makes policies; superintendent and secretary execute them | Board makes policies; executes some of them | Board makes few or no policies |
| Supply committees of school employees | 2* | 10 | 2 |
| The secretary | 3 | 9 | 3 |
| The superintendent | 9 | 7 | 3 |
| The superintendent and secretary-treasurer | 5 | 29 | 12 |
| The superintendent and principal | 0 | 17 | 9 |
| The school board | 0 | 2 | 2 |
| The superintendent and the board | 2 | 3 | 2 |
| Department heads and supervisors | 2 | 3 | 2 |
| Others | 0 | 3 | 9 |

* The figures in this table are reported as percentages.

matter of determining the amounts and the kinds of school supplies. Supply committees consisting of those employees who will use the supplies appear to be used rather sparingly in Alberta.

Teacher Advice on Teacher Welfare Problems (Criterion 19)

Each superintendent was asked to indicate the degree to which his school board seeks the advice of teachers on teacher welfare problems.

Data from the questionnaire indicate that school boards seek the advice of teachers only occasionally on teacher welfare problems. Only eight per cent of all boards regularly seek such advice, and seventy-four per cent do so occasionally. Twelve per cent of all school boards never seek such advice. Six per cent of the superintendents did not report. County school committees and school division boards show little difference in regard to the frequency with which they seek the advice of teachers on teacher welfare problems.

The Planning of New School Buildings (Criterion 20)

Each superintendent was asked to indicate the practices that his school board followed in the planning of new school buildings.

Table XVIII discloses the practices of school boards in planning new school buildings. Seventy-six per cent of all boards plan for new school buildings with the superintendent. There are some school boards who evidently use more than one of the listed other practices in planning new school buildings. Fifty-five per cent of the boards invite principals and teachers to participate

in the planning of new school buildings. The board and the superintendent figure heavily in the planning - as does the board's consultant, usually the architect.

From the table, it is evident that school boards place no emphasis on inviting students and laymen to present their ideas.

TABLE XVIII

PRACTICES SCHOOL BOARDS USE TO PROVIDE FOR THE
PLANNING OF NEW SCHOOL BUILDINGS, AS
REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|--|--|----------|-----------|
| | Divisions | Counties | All Units |
| The board and the superintendent do the planning | 67 | 86 | 76 |
| The board secures the services of a consultant in planning | 43 | 54 | 48 |
| The board invites principals and teachers to present their ideas | 53 | 57 | 55 |
| The board invites students to present their ideas | 0 | 0 | 0 |
| The board invites laymen to present their ideas | 0 | 0 | 0 |
| Other | 13 | 4 | 8 |

No outstanding differences appear between divisions and counties in regard to the people involved in the planning of new school buildings, with the possible exception of superintendents who did participate to a greater extent in the planning of new buildings in counties than in divisions.

Encouragement for Study of the Instructional Program
(Criterion 21)

Less than one board in ten encourages the professional staff and the community to participate in studying the needs and in recommending changes in the instructional program. Only one board out of fifty-eight arbitrarily decides what changes shall be made in the instructional program.

The typical Alberta school board requires no objective study of the instructional program but expects the superintendent, principals, and supervisors to recommend changes. School divisions and counties tend to operate very similarly in the matter of whom they consult to improve the instructional program.

III. RELATION TO COMMUNITY

Responsibility for School-Community Relations Program
(Criterion 22)

Data received from the questionnaires indicated that

most school boards (54 per cent) leave the school - community relations program to the superintendent and principals, or else share the responsibility with them. Almost one-half (45 per cent) of the school systems have no planned school - community relations program.

Provisions for Informing the Public (Criterion 23)

Fifty-seven per cent of the superintendents reported that provisions for informing the public were encouraged but that no regular plan was in use. Thirty-eight per cent of the boards make no provision for informing the public but leave informing the public entirely up to chance. School divisions and counties operate similarly in regard to provisions for informing the public about their schools.

Methods of Providing Community Educational Leadership (Criterion 24)

From Table XIX it is clear that the extent to which school boards invite community educational leadership is not great. Some superintendents reported that their boards used more than one method of encouraging educational leadership in their communities.

Sixteen per cent of the boards utilize committees of either laymen or staff to study school - community needs.

Twelve per cent invite their participation once

needs have been established.

Thirty-eight per cent encourage "utilization of community resources and talent on behalf of the children."

Thirty-four per cent encourage the establishment of adult education programs.

TABLE XIX

METHODS USED BY SCHOOL BOARDS TO PROVIDE FOR
COMMUNITY EDUCATIONAL LEADERSHIP, AS
REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|--|--|----------|-----------|
| | Divisions | Counties | All Units |
| The board encourages participation by committees of either laymen or staff personnel or both to study the needs of the community and the schools | 13 | 18 | 16 |
| The board invites participation in planning, once needs have been demonstrated | 17 | 29 | 12 |
| The board encourages the utilization of community resources and talent in behalf of children | 33 | 43 | 38 |
| The board encourages the establishment of adult education programs | 40 | 29 | 34 |
| Others | 7 | 11 | 8 |

Methods of Determining Public Opinions About Schools (Criterion 25)

Table XX reveals the practices of school boards in determining public opinion.

Public contacts by individual board members (86 per cent) and Home and School Associations (79 per cent) are the most common ways of determining public attitudes toward the school. Alberta school boards as a whole make limited effort to determine the will of the people. Evidently lay advisory committees, open board meetings, public forums, questionnaires, and checks with ratepayers associations, political groups, labor unions, and industry are not major methods used by Alberta school boards to determine public opinion.

Attendance at Board Meetings (Criterion 26)

Superintendents were requested to indicate who attends board meetings.

Table XXI indicates the various groups that attend board meetings. While the Alberta School Act makes open board meetings mandatory, sixty-six per cent of the superintendents reported that usually no outsiders were present. Eighty-four per cent of the superintendents reported the attendance of delegations and petitions. Only eight per cent of the superintendents reported that members of the public attended.

While no superintendent from a division reported that the press usually attended board meetings, eighteen per cent of the superintendents from counties reported that the press usually attended.

TABLE XX

METHODS USED TO DETERMINE THE OPINIONS OF PEOPLE
ABOUT THEIR SCHOOLS, AS REPORTED
BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|---|--|----------|-----------|
| | Divisions | Counties | All Units |
| Lay advisory committee | 3 | 7 | 5 |
| Open board meetings | 33 | 21 | 28 |
| Public Forums | 17 | 21 | 19 |
| Questionnaires | 10 | 7 | 8 |
| Public contacts by individual board members | 83 | 89 | 86 |
| Home and School Association | 80 | 79 | 79 |
| Check with leaders of such organizations as ratepayers associations, political groups, labor unions, industry, etc. | 10 | 7 | 8 |
| Other, specify | 13 | 25 | 19 |

TABLE XXI

EXTENT TO WHICH GROUPS ATTEND BOARD MEETINGS, AS
REPORTED BY SUPERINTENDENTS

| Item | Percentage of Each Group Attending | | |
|--|------------------------------------|----------|-----------|
| | Divisions | Counties | All Units |
| Members of the public | 10 | 7 | 8 |
| Usually representatives of the press | 0 | 18 | 8 |
| Principals and/or teachers and other staff members | 13 | 14 | 15 |
| Delegations and petitions | 77 | 89 | 84 |
| Usually no outsiders | 70 | 61 | 66 |
| Others | 13 | 14 | 15 |

Community Use of School Facilities (Criterion 27)

Data received from superintendents indicate that Alberta school boards strongly support community use of school buildings and grounds. Only one superintendent indicated that his board did not allow school buildings and grounds to be used for community purposes. Ten per cent of the boards have no rules or regulations governing the community use of school facilities but the board must decide each case on its own merits.

IV. WORKING PROCEDURES AND RELATED MATTERS

Practices of Boards in Conducting Meetings (Criterion 28)

Superintendents were asked to indicate the practices boards follow in conducting their meetings.

The data reported in Table XXII generally indicate that school boards in conducting their meetings follow recommended practices to a very limited extent. Fifty-three per cent start meetings on time. Forty per cent of the superintendents reported board discussion that was purposeful and to the point; thirty-one per cent give delegations specified lengths of time at board meetings; twenty-nine per cent have lengthy documents summarized; thirty-four per cent of the boards receive advance information and materials prior to a board meeting. Less than three-fifths of the boards word clearly their motions before they are placed in the minutes and only twelve per cent of the boards have adopted a written set of by-laws.

School boards fall short on most items necessary to the conduct of effective, well-organized business meetings.

The Order of Business Meetings (Criterion 29)

Forty-eight per cent of all superintendents report their boards have an established and recorded "order of business." An equal number (48 per cent) of superintendents

reported that their boards have no recorded "order of business" but conduct their business in the same order each meeting. Four per cent of the superintendents reported

TABLE XXII

EXTENT TO WHICH SCHOOL BOARDS FOLLOW EACH PRACTICE
IN CONDUCTING MEETINGS, AS REPORTED
BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|--|--|----------|-----------|
| | Divisions | Counties | All Units |
| Meetings always start on time | 53 | 54 | 53 |
| Discussion is purposeful and to the point | 50 | 29 | 40 |
| Delegations are given specified lengths of time | 33 | 29 | 31 |
| Lengthy documents and correspondence are summarized | 20 | 39 | 29 |
| Trustees receive advance information and materials | 33 | 36 | 34 |
| Motions by trustees are clearly worded before being recorded in the minutes | 53 | 64 | 59 |
| Written by-laws governing the boards internal working procedures have been adopted | 17 | 7 | 12 |
| Others | 3 | 7 | 5 |

their boards had no order or regular manner of conducting their business.

When school boards are analyzed according to their general character, the data (Table XXIII) reveal somewhat of an anomalous situation as nearly one-half of the boards reported by superintendents to be policy-makers have no recorded order of business.

TABLE XXIII

THE RELATIONSHIP BETWEEN THE SCHOOL BOARD AS A POLICY MAKING BODY AND THE PRACTICE OF HAVING AN "ORDER OF BUSINESS," AS REPORTED BY SUPERINTENDENTS

| Item | Extent to Which the School Board is a Policy-making Body | | |
|---|---|--|---------------------------------|
| | Board makes policies; superintendent and secretary executes them. | Board makes policies; executes some of them. | Board makes few or no policies. |
| The board has an established and recorded order of business | 10* | 28 | 11 |
| The board has no recorded order of business, but conducts its business in the same order each meeting | 9 | 28 | 9 |
| The board has no order of business and conducts its business in no regular manner | 0 | 3 | 2 |

* - The figures in this table are reported as percentages.

The Making of Business Contracts (Criterion 30)

Generally, business contracts are made with the knowledge and approval of the entire board. Ninety-three per cent of the superintendents reported this to be the case. However, twenty-eight per cent of the superintendents reported that business contracts were sometimes made with the knowledge only of a board committee, secretary, superintendent, or individual board member.

Practices in Handling Agenda and Minutes (Criterion 31)

Common practices in handling the board minutes and agenda as reported by superintendents are: (1) to hand the agenda and the minutes of the previous meeting to each board member prior to the beginning of each board meeting, (2) to mail them to the board members in advance of the meeting. The latter is the practice of sixty-four per cent of all boards while the former is the practice of twenty-four per cent of all boards. Twelve per cent of the boards send the minutes out to board members following the meeting and hand the agenda to the board members just prior to the beginning of the meeting. No differences were observed between the operation of counties and divisions in the matter of handling agenda and minutes.

The Making and Recording of Board Minutes (Criterion 32)

Each superintendent was asked to indicate the practices his board followed in making and recording board minutes.

Table XXIV shows the per cent of boards conforming to each recommended practice.

Almost all board minutes (95 per cent) indicated whether the motion was lost or carried, but few boards (36 per cent) used a system of indexing their minutes.

More divisions than counties had a system of indexing their minutes.

TABLE XXIV

PRACTICES FOLLOWED BY SCHOOL BOARDS IN RECORDING
BOARD MINUTES, AS REPORTED BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|---|--|----------|-----------|
| | Divisions | Counties | All Units |
| The situation that gave rise to the discussion in each case | 50 | 46 | 48 |
| The nature of the discussion | 40 | 57 | 48 |
| The motion itself clearly worded | 90 | 93 | 91 |
| Whether the motion was lost or carried | 93 | 96 | 95 |
| A system of indexing | 43 | 29 | 36 |

The Use of Special-Temporary Committees, 1964-65
(Criterion 33)

Seventy-six per cent of the superintendents reported that their boards used special committees. Seventeen per cent of the boards used no special committees, while seven per cent of the superintendents did not reply to this criterion. Three superintendents reported that their boards used as many as eight special committees. From the responses it is quite evident that Alberta school boards make frequent use of special - temporary committees.

Use of Standing (Permanent) Committees (Criterion 34)

Sixty-six per cent of the school boards in Alberta use standing committees. Seventy-three per cent of the divisions use standing committees, while only fifty-seven per cent of the counties do. One superintendent reported that his board had fourteen standing committees in all.

Counties generally have fewer standing education committees than school division boards.

Special Place for Board Meetings (Criterion 35)

Superintendents reported that all boards have a special board room in which they meet.

The Number of Regular Board Meetings During the Last Fiscal Year (Criterion 36)

Each superintendent was asked to indicate the number of regular meetings his board held during the last fiscal year.

Typically each Alberta school board held twelve to fifteen regular meetings during the fiscal year 1964. Fifty-four per cent of the boards met regularly twelve times per year. Forty-four per cent of the boards, however, held meetings more than once per month. Only one superintendent reported that his board held less than twelve regular meetings while two boards reported holding sixteen or more regular meetings during the year.

The Number of Special Meetings During the Last Fiscal Year (Criterion 37)

Table XXV shows the percentage distribution of boards that called special meetings during the last fiscal year. Fifty-nine per cent of the boards held from one to three special meetings, while thirty-three per cent held from four to six special meetings. Only one board did not hold a special meeting.

TABLE XXV

NUMBER OF SPECIAL BOARD MEETINGS HELD DURING
THE LAST FISCAL YEAR, AS REPORTED BY
SCHOOL SUPERINTENDENTS

| Item | | Percentage of School Boards Conforming | | |
|------|---------------|--|----------|-----------|
| | | Divisions | Counties | All Units |
| No | meetings | 0 | 3 | 2 |
| 1 | - 3 meetings | 60 | 57 | 59 |
| 4 | - 6 meetings | 37 | 32 | 33 |
| 7 | - 9 meetings | 3 | 4 | 4 |
| 10 | - 12 meetings | | 4 | 2 |

The Average Length of Regular Board Meetings (Criterion 38)

No superintendent reported board meetings to be less than three-and-one-half hours in length. Twenty-six per cent of the superintendents reported their meetings last from five-and-one-half hours to six hours; fifty-seven per cent of the superintendents reported that their board meetings last more than six hours.

A typical school board meeting in Alberta lasts more than six hours.

Board Agenda (Calendar) for the Year (Criterion 39)

Eighty-eight per cent of the superintendents reported that their board had no agenda (calendar) for the year.

Typically, Alberta school boards do not develop a yearly calendar or agenda to follow.

The Division of Time at Board Meetings (Criterion 40)

Data received from superintendents and compiled in Table XXVI indicate that boards spend the major portion of their time at board meetings on business and financial matters. Only nineteen per cent of the boards spend as much time on the educational program as they do on financial matters. Divisional boards spend more time on business and financial matters than county school committees.

TABLE XXVI

DIVISION OF TIME AT BOARD MEETINGS BETWEEN BUSINESS
MATTERS AND EDUCATIONAL PROGRAMS, AS REPORTED
BY SUPERINTENDENTS

| Item | Percentage of School Boards Conforming | | |
|--|--|----------|-----------|
| | Divisions | Counties | All Units |
| Board devoted the major portion of its time to business and financial matters | 87 | 72 | 79 |
| Board devoted as much time to the educational program as it does to business and financial matters | 13 | 25 | 19 |
| The board devotes more time to educational matters than it does to business and financial matters | 0 | 3 | 2 |

REFERENCES FOR CHAPTER IV

¹John Harvey Finlay, "Expectations of School Boards for the Role of the Provincially Appointed Superintendent of Schools" (unpublished Master's thesis, University of Alberta, Edmonton, March 30, 1961), p. iv.

CHAPTER V

SUMMARY OF FINDINGS, CONCLUSIONS AND SUGGESTIONS

This study was concerned primarily with investigating the operation of school boards in school divisions and counties in Alberta. As previously noted, the study was conducted on an extensive rather than an intensive basis. Chapter II briefly established the legal setting for the study. A review of the related literature on the operation of school boards was made in Chapter III. The major purpose of this review was to develop guidelines and specific criteria in order to determine how authorities in educational administration think school boards should operate. Data received from the questionnaires returned by superintendents were presented in Chapter IV in terms of headings developed from each criterion in Chapter III. These data indicate how Alberta school boards do operate.

This chapter summarizes briefly the findings in terms of the criteria established from the study of the literature, indicating in the case of each criterion, the degree to which school boards conform to each criterion. These findings are then related to the fourteen guidelines established in Chapter III and appropriate conclusions are drawn in the case of each guideline. Finally, several suggestions are made for the improvement of school board operation.

I. SUMMARY OF FINDINGS

The purpose of the first part of this chapter is to relate the data presented in Chapter IV to the criteria established from the study of the literature. Table XXVII presents the findings of the study and indicates the degree to which school boards operate in conformance with each criterion and guideline.

TABLE XXVII

SUMMARY OF EXTENT TO WHICH ALL SCHOOL BOARDS
CONFORM TO ESTABLISHED CRITERIA

| | | | | Percentage of all school boards conforming | | |
|------------------------------------|---|--|--|---|-------|--------|
| | | | | 0-33 | 34-66 | 67-100 |
| I. POLICIES, RULES AND REGULATIONS | | | | | | |
| <u>Guideline I</u> | | | | | | |
| 1(a) | The school board makes policy (Criterion 1a) | | | | | x |
| 1(b) | The administrative staff executes policy (Criterion 1b) | | | | | x |
| | (a) Administrators prepare the budget | | | | | x |
| | (b) Superintendent recommends teachers | | | | | x |
| | (c) Superintendent recommends principals | | | | | x |
| | (d) Superintendent recommends janitors | | | | | x |
| | (e) Superintendent supervises all personnel | | | | | x |
| 2. | Administrators exercise powers of discretion (Criterion 2) | | | | | x |
| 3. | The board has a planned building and maintenance program (Criterion 3) | | | | x | |
| 4. | The board purchases goods locally only when prices are comparable (Criterion 4) | | | | x | |
| 5. | Board members accept and support board policy (Criterion 5) | | | | x | |

TABLE XXVII (Continued)

Percentage of all school
boards conforming

0-33 34-66 67-100

Guideline II

- | | | | |
|----|--|---|---|
| 6. | Policies, rules and regulations are continuously revised (Criterion 6) | x | |
| 7. | Rules and regulations are adopted (Criterion 7) | | x |
| 8. | Policies, rules and regulations are recorded (Criterion 8) | | x |
| 9. | Policies, rules and regulations are made available to personnel in a satisfactory manner (Criterion 9) | x | |

II. RELATION TO ADMINISTRATION AND STAFF

Guideline III

- | | | | |
|-----|---|---|---|
| 10. | Principals are recommended for appointment by the superintendent (Criterion 10) | | x |
| 11. | Teachers are recommended for appointment by the superintendent (Criterion 11) | | x |
| 12. | Janitors are recommended for appointment by the superintendent (Criterion 12) | x | |

TABLE XXVII (Continued)

| | | Percentage of all school boards conforming | | |
|---------------------|---|--|-------|--------|
| | | 0-33 | 34-66 | 67-100 |
| <u>Guideline IV</u> | | | | |
| 13. | The school board has a written list of duties of its employees (Criterion 13) | x | | |
| 14. | The superintendent is responsible for the supervision of all personnel (Criterion 14) | | x | |
| <u>Guideline V</u> | | | | |
| 15. | The superintendent's professional advice is sought by the board (Criterion 15) | | | x |
| <u>Guideline VI</u> | | | | |
| 16. | People affected by policies participate in policy-making (Criterion 16) | | | x |
| | (a) superintendent and principal participate | x | | |
| | (b) teachers participate | x | | |
| | (c) laymen participate | | | |
| 17. | Personnel are involved in preparing the budget (Criterion 17) | | | |
| | (a) superintendent and secretary-treasurer participate | | | x |
| | (b) superintendent prepares budget by himself | x | | |
| | (c) secretary-treasurer prepares budget by himself | x | | |
| | (d) staff participate | x | | |

TABLE XXVII (Continued)

| | | Percentage of all school boards conforming | | |
|----------------------------|--|--|-------|--------|
| | | 0-33 | 34-66 | 67-100 |
| 18. | Extent personnel are involved in determining school supplies (Criterion 18) | | | |
| | (a) supply committees of school employees are used | x | | |
| | (b) secretary-treasurer is involved | x | | |
| | (c) superintendent is involved | x | | |
| | (d) superintendent and secretary-treasurer are involved | | x | |
| | (e) superintendent and principals are involved | x | | |
| 19. | Teacher advice sought on teacher welfare problems (Criterion 19) | x | | |
| 20. | Practices used in planning new school buildings (Criterion 20) | | | x |
| | (a) involve superintendent | | | |
| | (b) involve principals and teachers | | x | |
| | (c) involve students and laymen | x | | |
| 21. | The Board encourages the study of the instructional program (Criterion 21) | x | | |
| III. RELATION TO COMMUNITY | | | | |
| <u>Guideline VII</u> | | | | |
| 22. | The board accepts responsibility for the school-community relations program (Criterion 22) | | | x |

TABLE XXVII (Continued)

| | | Percentage of all School boards conforming | | |
|-----------------------|---|---|-------|--------|
| | | 0-33 | 34-66 | 67-100 |
| 23. | Adequate provisions used for informing the public (Criterion 23) | | x | |
| <u>Guideline VIII</u> | | | | |
| 24. | Methods used in providing community educational leadership (Criterion 24) | x | | |
| 25. | Methods used in determining public opinion about schools (Criterion 25) | | | |
| | (a) public contacts by individual board members and Home and School are used | | | x |
| | (b) questionnaires, public forums, open forums, lay advisory committees are used | x | | |
| <u>Guideline IX</u> | | | | |
| 26. | Groups that attend board meetings (Criterion 26) | | | |
| | (a) members of the public attend | x | | |
| | (b) principals and teachers attend | x | | |
| | (c) delegations and petitions attend | | | |
| | (d) usually no outsiders attend | | x | |
| <u>Guideline X</u> | | | | |
| 27. | The board provides for community use of school facilities (Criterion 27) | | | x |

TABLE XXVII (Continued)

Percentage of all school
boards conforming

0-33 34-66 67-100

IV. WORKING PROCEDURES AND RELATED MATTERS

Guideline XI

28. The practices boards follow in conducting meetings (Criterion 28)
- (a) meetings start on time x
 - (b) discussion is purposeful x
 - (c) delegations are given specified lengths of time x
 - (d) lengthy documents are summarized x
 - (e) advance information is sent to board members x
 - (f) motions are clearly worded in minutes x
 - (g) has a set of adopted by-laws x
29. The board has an order of business for its meetings (Criterion 29) x
30. Business contracts are made by the entire board (Criterion 30) x
31. Agenda and minutes are available in advance of meetings (Criterion 31) x
32. Practices boards follow in making and recording minutes (Criterion 32)
- (a) recording of situation that gave rise to the discussion x
 - (b) motions are clearly worded indicating whether carried or lost x

TABLE XXVII (Continued)

| | | Percentage of all school boards conforming | | |
|--------------------------------------|--|--|-------|--------|
| | | 0-33 | 34-66 | 67-100 |
| (c) boards have a system of indexing | | | x | |
| <u>Guideline XII</u> | | | | |
| 33. | Boards use special-temporary committees (Criterion 33) | | | x |
| 34. | Boards use no standing (permanent) committees (Criterion 34) | x | | |
| <u>Guideline XIII</u> | | | | |
| 35. | There is a special room for board meetings (Criterion 35) | | | x |
| 36. | The board holds regular meetings (Criterion 36) | | | x |
| ** 37. | The number of special meetings that were held during the last fiscal year (Criterion 37) | | | |
| 38. | Regular board meetings were not over three hours in length (Criterion 38) | x | | |
| <u>Guideline XIV</u> | | | | |
| 39. | The board has an agenda (calendar) for the year (Criterion 39) | | x | |
| 40. | Time at board meetings is approximately equally divided between education and business matters. (Criterion 40) | | | x |

**-- The degree of conformity is not shown for this criterion as the number of special meetings is dependent upon local circumstances.

II. CONCLUSIONS IN TERMS OF GUIDELINES

Policies, Rules and Regulations

Guideline I. Legislative powers and functions belong to the school board. The executive powers and functions belong to the administrative staff.

Conclusion. Since over one-half (59 per cent) of the boards engage in performing some executive functions, while less than one-fifth (19 per cent) of the boards were reported by superintendents as being policy-makers who delegate executive functions to its administrative staff, it may be concluded that Alberta school boards do not conform to this guideline to a satisfactory extent.

Guideline II. Rules and regulations should be adopted related to those matters on which the board has established policy.

Conclusion. Ninety-five per cent of the boards have rules and regulations related to their policies. Slightly less than one-half (46 per cent) of these have the rules and regulations related to policies in their minutes only, while slightly more than one-half (54 per cent) have them in handbooks. Inspection of the data as reported by superintendents indicate that most Alberta school boards conform to Guideline

II in a general way.

Relation to Administration and Staff

Guideline III. The board should appoint both the teaching and the non-teaching staff upon the recommendation of the superintendent.

Conclusion. Alberta school boards conform to Guideline III almost completely with respect to the appointment of the professional staff but they do not conform to the guideline at all with respect to the appointment of the non-teaching staff.

Guideline IV. The board's rules and regulations should contain a clear statement of the duties of its employees.

Conclusion. While only fifteen per cent of all boards have lists of duties of their employees, another fifty-two per cent have lists of duties for some of their employees. It may be concluded that Alberta school boards conform to this guideline only to a small degree.

Guideline V. The superintendent should be the educational leader of the community.

Conclusion. Over nine-tenths (95 per cent) of the boards seek the professional advice of the

superintendent. On the basis of the one criterion, almost all school boards conform to this guideline.

Guideline VI. Persons who will be affected by a decision should be invited to participate in the thinking involved prior to the decision being made.

Conclusion. While superintendents and principals are involved to a considerable degree (97 and 86 per cent respectively) in policy development, teachers and laymen are consulted by less than one-third of the boards. It may be concluded that school boards only partially conform to this guideline.

Relation to the Community

Guideline VII. The school board should approve a public relations program upon the recommendation of the superintendent and should delegate the responsibility for its execution to the superintendent.

Conclusion. Fifty-four per cent of the superintendents indicated that they have responsibilities for the public relations program, but only one superintendent reported his board as having an organized public relations program in each school. Alberta school boards have not developed well-organized public relations programs, and hence

conform to Guideline VII only to a very limited extent.

Guideline VIII. The school board should provide lay educational leadership.

Conclusion. School boards as indicated in this study do not make extensive use of lay advisory committees, political groups, leaders in industry or other organizations. Open board meetings, public forums, and questionnaires are used by less than one-third of the boards.

Findings from this study indicate that school boards do not conform to the requirements of this guideline.

Guideline IX. School board meetings should be open to the public and adequate facilities provided for those who wish to attend.

Conclusion. Although the Alberta School Act makes it mandatory for school boards to conduct open meetings, limited space, and general board reaction toward public groups attending may be factors which discourage public groups from attending. Since sixty-six per cent of the superintendents reported that their boards usually had no outsiders at their meetings, while only eight per cent of the superintendents

reported their boards as having members of the public as regular attenders, it may be concluded that school boards, in practice, conform to Guideline IX only to a very limited extent.

Guideline X. School buildings and grounds should be made available for community use.

Conclusion. Since ninety-eight per cent of the school boards make school buildings and grounds available for community use, it may be concluded that school boards in Alberta conform almost completely to this guideline.

Working Procedures and Related Matters

Guideline XI. The school board should establish functional and adequate business procedures.

Conclusion. Less than one-half of the school boards follow recommended practices in conducting their meetings. Not all contracts are made with the knowledge and approval of the entire board. Approximately two-thirds of the boards have the minutes of the previous meeting mailed to the board members in advance. Approximately one-half of the boards follow recommended practices in recording their minutes. It may be concluded from the findings of this study that many boards do not conform to recommended business procedures.

Guideline XII. The school board should act as a committee of the whole.

Conclusion. Brubaker, in studying Indiana school boards, found that ninety-seven per cent of the boards adhered to this guideline.¹ In Alberta, counties approach this guideline more closely than divisions. However, since two-thirds of the school boards use permanent standing committees, it may be concluded that school boards in Alberta do not conform to the requirements of this guideline to a satisfactory extent.

Guideline XIII. There should be a regular time, place, and length of time (not more than three hours) for school board meetings. Special meetings should be held only when necessary and should be confined to the purpose for which the meeting was called.

Conclusions. Since the typical Alberta school board holds one regular monthly meeting and one special meeting every two to three months in a special board room, it may be concluded that boards conform well to this part of the guideline. One hundred per cent of the board meetings last more than three hours. School boards do not conform to this part of the guideline at all.

Guideline XIV. The school board should have a yearly agenda and the content of the meetings should be planned such that educational matters and business matters are given approximately equal time.

Conclusion. Less than one-seventh (12 per cent) of the boards have a yearly agenda and less than one-third (19 per cent) of the boards devote as much time to educational matters as they do to business and financial matters at their meetings. It may be concluded that not more than one school board in five in Alberta conforms to the conditions of this guideline.

III. SUGGESTIONS

General Suggestion

From the findings of this study there appears to be a need to strengthen the over-all functioning of school boards. In view of the functions that state school board associations, universities and colleges, teachers' associations, administrators' organizations and other institutions are performing in the United States, as reported in Chapter I of this study, it would seem advisable that a study be made to determine the kinds of services that similar institutions might effectively provide

in Alberta.

Specific Suggestions

A review of the findings of this study suggests areas in which school boards measured up reasonably well. There were, however, several aspects of school board operation which fell short of the criteria established in this study. Although many suggestions could be made in an attempt to improve the effectiveness of school board operation, only six specific suggestions related to those aspects of board operation which are in most apparent need of strengthening are stated. These suggestions are listed below under the four main areas of the study set out in Chapter I.

Policies, rules and regulations

(1) That boards place more emphasis on their role as policy-makers and that they delegate the execution of policies to their administrative staff. Where a board has not developed a policy handbook with rules and regulations related to its policies, it should do so.

Relation to administration and staff

(2) That boards clarify in writing the functions and responsibilities of the board and its members as well as the duties of its employees.

(3) That boards might well make better provision

for consulting and seeking the advice of their staffs on welfare problems and on other matters which directly affect their staffs.

Relation to community

(4) That boards develop well-organized public relations programs in which they give careful attention to the various media they might use to communicate with the community.

Working procedures and related matters

(5) That some means be undertaken to provide assistance to school boards in order that the working procedures of school boards can be improved.

(6) That school boards abolish their standing committees and operate as committees of the whole.

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A P P E N D I C E S

APPENDIX A - Copy of Memorandum to Dr. T. C. Byrne

Rocky Mountain House, Alberta

May 26, 1965

Dr. T. C. Byrne
Chief Superintendent of Schools
Department of Education
Edmonton, Alberta

Dear Sir:

Enclosed is a copy of my questionnaire, "A Study of the Operation of School Boards in the Large Rural School Units in Alberta," which I have sent to four former superintendents of schools for them to complete and for them to critically analyze as a pilot study. I would be pleased if you could spare the time to have a look at it and make any comments you feel would improve the questionnaire.

Since it is intended that these questionnaires will be sent to provincial superintendents, I hope you will give your consent and support to this study. Both Dr. Kratzman and I believe that it might prove helpful in soliciting returns if there could be a form letter from you to accompany each questionnaire.

Your comments regarding any aspect of this study would be greatly appreciated.

Sincerely,

H. I. Hastings
Superintendent of Schools

APPENDIX B - Copy of Memorandum from Dr. T. C. Byrne
to Superintendents of Schools

DATE: June 9, 1965
FROM: Chief Superintendent of Schools
TO: Superintendents of Schools

Mr. Hastings, Superintendent of Rocky Mountain School Division is doing a thesis which involves a questionnaire entitled "A Study of the Operation of School Boards in the Large Rural School Units in Alberta."

It would be useful to the Department if this information could be drawn together in a general statement. Might I suggest then that you help Mr. Hastings in his project, by completing his questionnaire for him.

Chief Superintendent of Schools

APPENDIX C - Copy of Letter accompanying the Questionnaire
to Superintendents of Schools

Rocky Mountain House, Alberta

May 25, 1965

Dear Superintendent:

At the present time I am completing my graduate work in Educational Administration at the University of Alberta, Edmonton. As part of my work, I am attempting a study of the operation of school boards in divisions and counties of Alberta. In order to collect data for this study, I have constructed a questionnaire which I am enclosing with the hope that you will find time to complete it and return it to me at your earliest convenience.

The enclosed memorandum from Dr. Byrne indicates that he has given his approval to my conducting this study.

Data collected from individual superintendents will be held confidential. A summary of the data collected for the province will be sent to all county and divisional Superintendents.

It is my hope that this study will help all of us who are directly connected with education in the province.

My sincere appreciation to you for your co-operation in this project.

Sincerely,

H. I. Hastings,
Superintendent of Schools

HIH/mrr
Encl.

APPENDIX D - A copy of the questionnaire with instructions and definitions of terms. Shown opposite each item in each questionnaire are the responses expressed in percentages.

A STUDY OF THE OPERATION OF SCHOOL BOARDS IN
THE LARGE RURAL SCHOOL UNITS IN ALBERTA

In the spaces provided at the top of the questionnaire, please indicate:

- (1) whether you are a superintendent of a division or of a county;
- (2) the number of full-time teachers on the staff of your division or county as of May 1, 1965;
- (3) name of county or division.

Please answer as many of the questions as you can. Accuracy is essential. If you cannot answer a question, leave it out and proceed to the next one. Unless otherwise indicated, only one answer should be checked () after each question.

As the meanings of some terms used in the questionnaire may not be clear, or may have meanings that are slightly different from regular use, they have been defined below:

| | |
|------------------------------|---|
| <u>Policies:</u> | are guidelines or principles adopted by the board to assist the administration to establish the limits of its action. They are guides for discretionary action. |
| <u>Rules or Regulations:</u> | are the detailed directions necessary to put policies into effect. These are usually developed by the administration. |
| <u>School Board:</u> | shall mean the board of trustees of a school division or the education committee of a county. |
| <u>Special Committees:</u> | are temporary committees set up by the board for a special purpose. |
| <u>Standing Committee:</u> | are permanent committees set up by the board to handle specific aspects of board work. |
| <u>By-Laws:</u> | are the board's officially adopted and recorded internal rules or working procedures. |

A STUDY OF THE OPERATION OF SCHOOL BOARDS IN THE
RURAL SCHOOL UNITS IN ALBERTA

- (1) Superintendent of: Division
County
- (2) Number of full-time teachers on
the staff of your division or
county:
- (3) Name of county of division

Policies, Rules and Regulations

1. What is the general character of your school board?

19 (a) The board is primarily a policy-making
body and delegates the responsibility
for execution of all policies to the
superintendent and secretary-treasurer.

59 (b) The Board makes policies but reserves
the right of execution of some of them
for itself or its members.

22 (c) The Board makes few or no policies but
spends its time at meetings on details
of operation and business.

2. To what extent does the board permit the superin-
tendent and/or the secretary-treasurer to exercise
discretion in making decisions?

9 (a) The superintendent and/or the secretary-
treasurer may decide upon matters about
which no specific provision has been made
in policy or regulations.

70 (b) The secretary and/or superintendent may
decide upon some matters not covered in
policy or regulations.

21 (c) All matters not covered in policy or
regulations must be taken to the board.

3. Does your school board have a planned maintenance program that provides for such things as repairs, improvements, and maintenance of buildings?
- 45 (a) Yes - in every respect.
- 47 (b) Yes - to a limited degree.
- 8 (c) No - repairs, improvements and maintenance are made only when necessitated.
4. To what extent are local merchants, except for miscellaneous purchases, given school business?
- 2 (a) At all times when goods are available regardless of price.
- 50 (b) Only when goods can be bought as cheaply or more cheaply locally.
- 36 (c) Whenever local prices are not greatly in excess of prices obtainable elsewhere.
- 5 (d) Never.
5. Do your board members accept and support the policy decision of the Board?
- 60 (a) All board members do.
- 40 (b) Quite often at least one board member will take a stand outside the board room opposed to board policy.
6. If separately recorded rules and regulations or policies existed when did the board last make additions to, or revisions of them?
- 35 (a) Continuously during the last year.
- 12 (b) Two years ago, approximately.
- 0 (c) Three years ago, approximately.
- 7 (d) Four years or more ago.

7. Does your Board have rules and regulations related to policies?

17 (a) The board has rules and regulations covering the policies.

83 (b) The board has some rules and regulations.

0 (c) The board has no rules or regulations.
(Decisions are made when specific problems present themselves.)

8. How are the policies and/or rules and regulations recorded?

46 (a) Recorded in board minutes only.

54 (b) Separate records are kept.

0 (c) None is kept in either minutes or separate records.

9. How are the rules and regulations made available to school personnel? (Check those that apply.)

54 (a) By handbooks.

76 (b) By mimeographed notices.

2 (c) By use of bulletin boards.

8 (d) By a book kept in the secretary's office.

14 (e) By word of mouth.

7 (f) Other (Explain.) _____

Relation to Administration and Staff:

10. How are principals selected?

93 (a) The board appoints only principals recommended by the superintendent.

5 (b) The board appoints some principals without the recommendation of the superintendent.

0 (c) The board appoints all principals without the recommendation of the superintendent.

2 (d) Other (Specify.) _____

11. How are teachers selected?

100 (a) The board appoints only those teachers recommended by the superintendent.

0 (b) The board appoints some teachers without the recommendation of the superintendent.

0 (c) The board appoints all teachers without the recommendation of the superintendent.

0 (d) Other (Specify.) _____

12. How are the school janitors selected?

0 (a) The board appoints only those janitors recommended by the superintendent.

12 (b) The board appoints some janitors without the recommendation of the superintendent.

78 (c) The board appoints all janitors without the recommendation of the superintendent.

10 (d) Other (Specify.) _____

13. Has the board developed a written list of the duties of its employees?

15 (a) Yes.

33 (b) No.

52 (c) For some employees (Specify.) _____

14. Who assumes the function of supervision of personnel?

26 (a) The superintendent is authorized to place, supervise, transfer, and to recommend dismissal of all employees.

71 (b) The school board at times or in some cases participates in the control of employees.

3 (c) Employees are given instructions about what they are to do by the board or any of its members.

15. Does the board seek professional advice from the superintendent?

95 (a) The board frequently asks the superintendent for advice.

5 (b) The board seldom does so.

0 (c) Board members seek no professional advice from the superintendent.

16. Are personnel affected by policies and/or rules and regulations involved in their development? (Check those that apply.)

97 (a) Superintendent (makes recommendations.)

86 (b) Principals (help by presenting their problems and ideas.)

29 (c) Teachers (help as individuals or in committees by presenting their problems and ideas.)

17 (d) Laymen (help by presenting their problems and ideas.)

12 (e) Other (Specify.) _____

17. Who prepares the budget?

0 (a) The board or its committee.

0 (b) The superintendent and the board.

8 (c) The secretary-treasurer.

0 (d) The superintendent.

43 (e) The superintendent, secretary-treasurer and the board.

46 (f) The superintendent and the secretary-treasurer.

3 (g) Others (Specify.) _____

18. Who determines the amount and kind of school supplies to be purchased? (Check those that apply.)

15 (a) Supply committees of school employees (consisting of employees who will use the supplies.)

15 (b) The secretary.

19 (c) Superintendent.

47 (d) The superintendent and secretary-treasurer.

33 (e) The superintendent and principal.

5 (f) The school board.

7 (g) The superintendent and the board.

7 (h) Department heads and supervisors.

14 (i) Others (Specify.) _____

19. Does your board seek the advice of teacher representatives on teacher welfare problems?

8 (a) Yes, regularly.

74 (b) Yes, occasionally.

12 (c) Never.

6 (d) No report.

20. How does your school board provide for the planning of the school buildings? (Check those that apply.)

76 (a) The board and the superintendent do the planning.

48 (b) The board secures the services of a consultant in planning and building new school buildings.

55 (c) The board invites principals and teachers to present their ideas and to participate in the planning.

0 (d) The board invites the students to present their ideas.

0 (e) The board invites laymen to present their ideas.

8 (f) Other (Specify.) _____

21. What means does the board use to provide for the study and improvement of the instructional program?

7 (a) It encourages the participation of both the professional staff and the community in studying needs and recommending changes for improvement.

91 (b) It requires no objective study of the program but expects the superintendent, principals, teachers, and supervisors to recommend changes.

2 (c) The board arbitrarily decides what changes shall be made.

Relations to Community:

22. Does the school board take direct responsibility for the school - community relations program or leave it to the superintendent?

0 (a) The school board takes direct responsibility.

26 (b) It is left to the superintendent and principals.

45 (c) The school system has no planned program.

28 (d) Shared responsibility between board, superintendent, and principals.

23. What provisions have been made for informing the public?

2 (a) An organized public relations program is in operation in each school.

57 (b) A school public relations program is encouraged but no regular plan is in use.

38 (c) A school public relations program is left entirely to chance.

24. In what ways does your board provide community educational leadership? (Check all that apply.)

16 (a) The board encourages participation by committees of either laymen or staff personnel or both, to study the needs of the community and the schools.

12 (b) The board invites participation in planning, once needs have been demonstrated.

38 (c) The board encourages the utilization of community resources and talent on behalf of the children.

34 (d) The board encourages the establishment of adult education programs.

8 (e) Other (Specify.) _____

25. What are the methods used to determine the will or the attitudes and opinions of the people about their school? (Check all that apply.)

5 (a) Lay advisory committee (or similar committee) to the school board.

28 (b) Open board meetings.

19 (c) Public forums.

8 (d) Questionnaires.

86 (e) Public contacts by individual board members.

79 (f) Home and School Association.

8 (g) Checks with leaders of such organizations as ratepayers associations, political groups, labor unions, industry, etc.

19 (h) Other (Specify.) _____

26. Who attends board meetings? (Check all statements that apply.)

8 (a) Members of the public.

8 (b) Usually representatives of the press.

15 (c) Principals and/or teachers and other staff members.

84 (d) Delegations and petitions.

66 (e) Usually no outsiders.

15 (f) Others (Specify.) _____

27. Are school buildings and grounds available for use by the community?

- 86 (a) Yes - the board has rules and regulations concerning (rent, use of equipment, and who can use) the use of school buildings and grounds for community purposes.
- 10 (b) Yes - but the board has no such rules and regulations; it decides each case on its own merits.
- 2 (c) No - the board allows school buildings and grounds to be used only for school purposes.
- 2 (d) Other (Specify.) _____
-

Working Procedures and Related Matters:

28. What practices does your board follow in conducting its board meetings? (Check those that apply.)

- 53 (a) Meetings always start on time.
- 40 (b) Discussion is purposeful and to the point.
- 31 (c) Delegations are given specified lengths of time.
- 29 (d) Lengthy documents and correspondence are summarized.
- 34 (e) Trustees receive advance information and materials.
- 59 (f) Motions made by trustees are clearly worded before being recorded in the minutes.
- 12 (g) Written by-laws governing the board's internal working procedures have been adopted. (e.g., time and place of meetings, organization of agendas, voting, procedures....)

5 (h) Others (Specify.) _____

29. To what degree does your board have an order of business for its meetings?

48 (a) The board has an established and recorded order of business.

48 (b) The board has no recorded order of business, but conducts its business in the same order each meeting.

4 (c) The board has no order of business and conducts its business in no regular manner.

30. Business contracts are made. (Check those that apply.)

93 (a) With the knowledge and approval of the entire board.

12 (b) With the knowledge and approval only of a board committee.

10 (c) With the knowledge only of the secretary.

4 (d) With the knowledge only of the superintendent.

2 (e) Often by individual board members.

0 (f) Other (Specify.) _____

31. How are the agenda and minutes handled?

64 (a) The agenda and minutes of the previous meeting are mailed to each board member prior to each board meeting.

24 (b) The above are handed out at board meetings.

0 (c) The above are not available in written or typed form to board members nor board personnel.

12 (d) Other (Specify.) _____

32. Do your board minutes indicate: (Check those that apply.)

48 (a) The situation that gave rise to the discussion in each case.

48 (b) The nature of the discussion.

91 (c) The motion itself clearly worded.

95 (d) Whether the motion was lost or carried.

36 (e) A system of indexing.

33. How many special - temporary school board committees did your board use last year?

17 (a) None.

76 (b) One or more. Please give number. _____.

34. Does your board have standing (permanent) committees?

34 (a) No standing committees.

66 (b) Yes one or more.

Please list the standing board committees.

1. _____ 4. _____

2. _____ 5. _____

3. _____ 6. _____

35. Please indicate the place where school board meetings are held.

100 (a) A special board room.

0 (b) Superintendent's office.

0 (c) A school building.

0 (d) A regular place but not school property.

0 (e) No regular place.

36. Regular meetings were held the indicated number of times during the last fiscal school year.

2 (a) Less than 12.

54 (b) 12

40 (c) 13 - 15

2 (d) 16 - 18

2 (e) More than 18.

37. Special meetings were held the indicated number of times during the last fiscal school year.

2 No meetings

59 (a) 1 - 3

33 (b) 4 - 6

4 (c) 7 - 9

2 (d) 10 - 12

 (e) More than 12.

38. What was the estimated average length of regular school board meetings the last fiscal school year?

 (a) From 2 to $2\frac{1}{2}$ hours.

 (b) From $2\frac{1}{2}$ to 3 hours.

 (c) From 3 to $3\frac{1}{2}$ hours.

4 (d) From $3\frac{1}{2}$ to 4 hours.

 (e) From 4 to $4\frac{1}{2}$ hours.

7 (f) From $4\frac{1}{2}$ to 5 hours.

5 (g) From 5 to $5\frac{1}{2}$ hours.

26 (h) From $5\frac{1}{2}$ to 6 hours.

57 (i) More than 6 hours.

39. Does your board have an agenda (calendar) for the year?

12 (a) Yes.

88 (b) No.

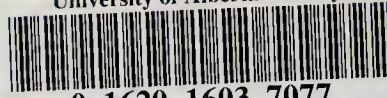
40. How does your board divide its time at board meetings between business and educational programs?

79 (a) The board devotes the major portion of its time to business and financial matters.

19 (b) The board devotes as much time to the educational program as it does to business and financial matters.

2 (c) The board devotes more time to educational matters than it does to business and financial matters.

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